



BUYER'S GUIDE TO CHOOSING THE RIGHT REMOTE SUPPORT TOOL IN FINANCIAL SERVICES




Financial services never sleeps. Ensure your support tool has what it takes to keep business moving.

With transactions happening 24/7, sensitive data to protect, multiple physical and online properties to cover, customers and employees to support, regulations to comply with, and increasingly cunning malicious actors to lock out, IT teams in the financial services industry have their work cut out for them.

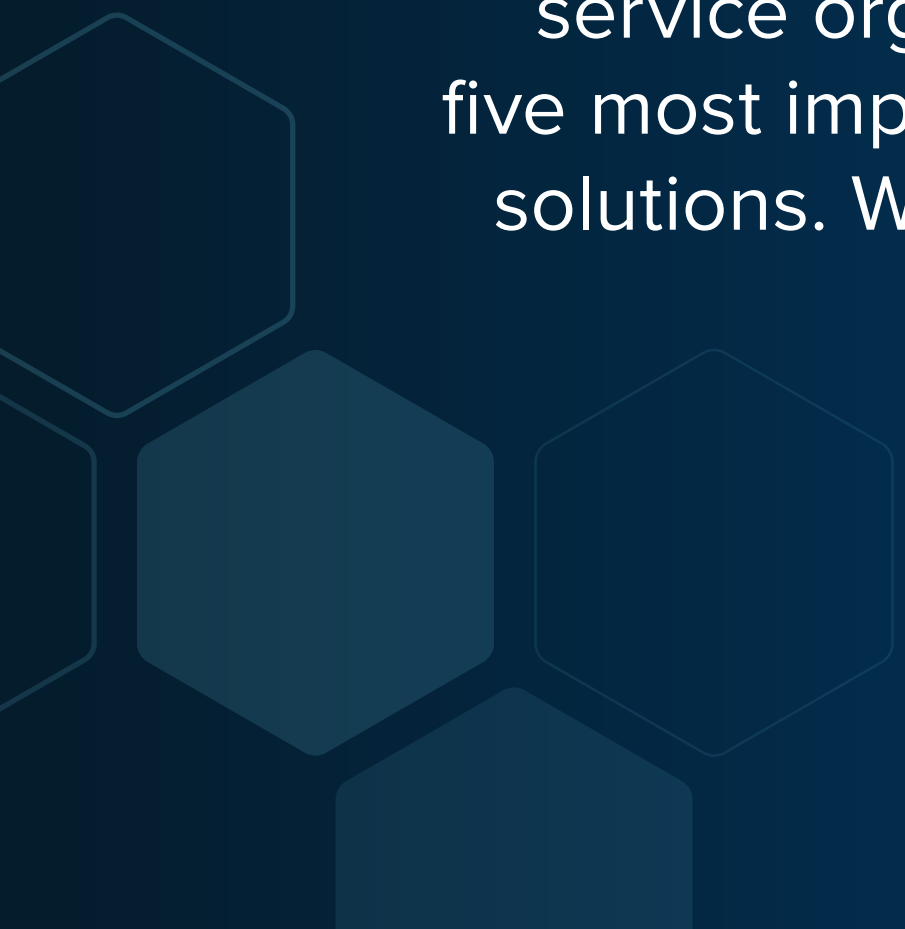
To deliver support your business relies on, you need a remote support solution you can rely on. One that fits the unique needs in your industry and organization.





This buyer's guide can help you select the remote support tool that will work best for your organization. With nearly 20 years of experience, Rescue delivers the key features and functionalities that make us the market leader in the remote support space.

Based on experience working with support professionals in financial service organizations of all sizes worldwide, we have identified the five most important factors to consider when evaluating remote support solutions. We have designed the following guide to help you through the selection process.



1 Support anything and everything – fast.

Most remote support solutions provide remote control, remote screen sharing and file transfer, allowing technicians to perform routine tasks. But you should look for a solution that goes further and enables technicians to perform more advanced tasks via more sophisticated capabilities.

Quick diagnostics

Getting harried users to accurately describe what's happening on their computers, tablets or smartphones is a time-consuming and error-prone process. With quick diagnostic capabilities, technicians can check essential technical data automatically, which speeds up troubleshooting and reduces frustration.

Mobility

Your organization must support a growing array of devices, not just PCs and Macs but also mobile devices. The ability to support these devices can be a benefit for your users, and the ability to support from these devices can be a business benefit for you. Look for a remote support solution that will meet your mobility needs, both to and from mobile devices.

Camera sharing

Ensure your support can extend past online devices to hardware, like ATMs and teller machines, and on location, such as where insurance claims need to be verified. By seeing the equipment or space through a live video feed, you can guide the end user onsite to a fast resolution and gather the claim information you need on the first call without the need to send someone onsite.

Fast connection

Faster connections reduce incident handling time and user frustration. While no hard-and-fast rules apply, establishing a connection should be quick and efficient to increase your customer satisfaction on every call.

Multiple session handling

The days of providing support to only one user at a time are long gone. A modern remote support solution requires an interface that enables technicians to interact with end users online via chat while having multiple sessions running simultaneously. Thus, techs can work more effectively and solve problems quickly, which lowers support costs.

Collaboration

If technicians are working remotely, they are unable to pop by a colleague's desk to ask for advice or collaborate on a fix. Ensure your solution supports technician collaboration, wherever they are. Consulting another tech, escalating an issue to an expert and observing specialists as they resolve issues for real-time training opportunities should be effortlessly enabled.

2

Take control of the end user and tech experience.

Customers demand easy, efficient support and have no shortage of options when it comes to finding a company to do business with that meets their high expectations and security requirements. At the same time, you want to keep your IT technicians satisfied and avoid turnover that can negatively impact productivity and costs. Here are the features you need to deliver excellent experiences.

Less effort

Users who aren't tech-savvy often find it difficult to follow requests from technicians over the phone. Your remote support tool should allow support sessions to start with minimal steps for the user and enable techs to conduct triage steps without additional user involvement. The solution should operate even when a device is unattended – after the appropriate authorization is given – so users can get on with other tasks.

Communication channels

Today's users expect to communicate with organizations the way they choose. Your remote support solution should allow them to request support through multiple channels, whether it be a website, a desktop icon, a mobile app or a supported device that does not require previously installed software.

Integration with other systems

Most organizations use a multitude of tools to gather information and solve problems, like CRM and fintech software. The ability to integrate these tools will make it less time consuming and frustrating for technicians and users. With out-of-the-box integrations and customizable APIs, your remote support tool can work with your unique workflow and environment.

Administration

Managers need certain admin capabilities to run their departments efficiently. Your remote support solution should go deep here, allowing them to assign issues based on expertise, create escalation levels, monitor techs, conduct customer satisfaction surveys, and much more.



3 Protect data, stay in compliance, and secure your business.

With cyberthreats on the rise that target the financial services industry, sensitive data to protect, and compliance concerns, the security of your remote support tool should be uncompromising, especially since these tools enable access to devices that often hold proprietary applications and confidential data.

Communications and data transfer

Your remote support tool should use a TLS 1.2 transport security and AES- 256-bit encryption, as well as two-step verification logins to ensure that messages are exchanged confidentially, that transferred files cannot be hacked and that data at rest is protected.

Technician management/roles and permissions

Your administrators should be able to manage technician access by defining the roles and permissions that techs will need to do their jobs. The solution should include capabilities that allow administrators to define permissions for different tech groups and get real-time usage reports.

Additional enterprise security layers

Look for a solution that goes beyond core security measures. You should be able to choose to host your own PIN webpage, block unwanted traffic, restrict access to only users in your company and control how PIN codes are generated and accepted – all as you see fit.



Compliance support

Ensure your remote support solution provider shares the certification and documents you need to stay in compliance with the regulations you need to uphold, such as GDPR and PII, FedRAMP, FINRA, FATCA. Look for:

- Voluntary Product Accessibility Template (VPAT)
- SOC 2 and SOC 3 reports
- Technical and Organizational Measures (TOMs)
- ISO Certificate
- Sub-processor disclosure
- Detailed security measures
- Privacy and data transfer measures
- Penetration tests
- Disaster recovery assessment



4 Bank on the solution's dependability and reliability.

When end users rely on you, you need to be able to rely on your technology. Ensure your tools can be trusted and that they can scale to handle more technicians and users without eroding reliability, availability, or performance.

Reliable session loads

Support loads can vary widely based on many factors. A remote support solution must be able to handle a maximum load while maintaining high performance and response times and offer high availability and minimal downtime, even when you can't anticipate the load.

Reliable uptime

Your customers and end users rely on your support tools being available. Take a close look at uptime when considering a solution. Anything less than 99.9 percent availability is unacceptable.

Flexible licensing

Be ready to scale, grow, and flex with the changing demands of the support landscape. You should be able to continually optimize your remote support solution to meet evolving needs and use cases for the long term.

Your remote support checklist

Whether you are investigating remote support solutions for the first time or you're unhappy with your current remote support tool, this checklist will help you compare various solutions so you can more effectively weigh your options and choose the tool that best meets the unique requirements of your organization.

- ✓ Is this tool easy enough for not-so-tech-savvy end users?
- ✓ Can we rely on this tool to be available when we need it?
- ✓ Does it take 20 seconds or less to initiate a support session?
- ✓ Can our support team optimize their time while seamlessly managing multiple remote support sessions at once?
- ✓ Can we access information about a user's system without remote control to help resolve issues faster?
- ✓ Does the tool generate reports based on technician statistics and activity, as well as user satisfaction levels?
- ✓ Does the tool meet the rapidly expanding security standards of our organization, and those of our end users?
- ✓ Does the tool improve first-call resolution via technician collaboration, sharing of sessions or escalation when it's needed?
- ✓ Can we get users into sessions through multiple entry points, including email, direct links and browsers?
- ✓ Can we customize the support tool to show off our brand?
- ✓ Can we extend support beyond computers and mobile devices without being on-site?
- ✓ Does the support tool allow us to support both customers and employees to achieve cost and time savings?



Keep your financial services organization fully supported.

If your remote support solution is lacking in functionality,
or if your tool isn't providing the best user experience,
it's time to look for more.

We're here to help!
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Rescue, built by GoTo.
Remote support made easy.