10 things you can do to make remote support easier

Takeaway: Your remote support tasks will go more smoothly — and your users will be happier — if you follow a few simple practices.

I spend much of my day doing remote support for numerous clients. Over the years, I've managed to make this process fairly painless and easy. Most remote support engineers assume the biggest roadblock to success is the end user. That is not always the case. It is our job to not only fix remote issues, but to make the task simple for all parties involved.

Of course, I understand that everyone's approach to remote support is different: Different tools, different cross-sections of users, different problems. In the end, however, there is only one acceptable result — success. Here are 10 ways to simplify your remote support efforts and satisfy your clients.

1: Be consistent

Believe it or not, you'll be revisiting end users more than once. Some of them will pop up in your ticket queue over and over again. So you need to be consistent in your approach to remote support, in both how you instruct end users and which tools you use. This will go a long way toward easing the worries of your end users and it will make your job a lot easier.

2: Find the right tool

There are a lot of tools out there for remote support. Team Viewer, LogMeIn, GoToMyPC, each one offers a different feature set and a drastically different UI. It is important to find the right tool for your use — one that has a UI you can easily use and one that serves every purpose you need. If you that one solution doesn't work for everything, you can employ multiple solutions. Just remember you must not throw curve balls at your end users.

3: Never panic end users

The phrases "Oh no!", "Oh crap!", "Well, that's not right!" and the like should not be a part of your remote vocabulary. Let's face it. At some point, you'll find a remote you can't fix. When that time comes, be professional and don't worry your end users or let them know you either messed up or a problem is beyond your skill. Make sure they know the issue will be resolved but you might have to escalate it to an upper-level support technician. This ensures the client understands you have their best interests in mind.

4: Use a headset or Bluetooth

This should be a no-brainer. Do not try to do remote support with a cell phone or standard phone propped between your shoulder and your head. Why? You'll risk the client hearing you drop your phone and you'll wind up with neck problems. This is a small investment that will make your job much easier. And I'm always shocked when I see remote engineers not making the easiest change that will give them the most physical benefit.

5: Control your environment

When working on remote cases, you need to be free from distractions. Extraneous noise is one of the biggest problems. When you're working on a remote, your clients need to know your attention is on them and that you're working within a professional environment. This also means you must not work from a public Wi-Fi. Unless you have no other option, make sure you run your remote sessions from the quiet of your own office.

6: Point and click

If you have end users you help frequently — and they have trouble pointing their browsers to URLs — add a support icon on their desktops that will make your help just a double-click away. If this isn't an option, you can always install full versions of, say, Team view, and note their user ID and password so you do not require their interaction to get on their machine. Just make sure you always have their permission to get on and that they know when you will be working on their desktop.

7: Document calls

You should be keeping notes of everything you do. This may seem like a pointless task, but one day you will regret not knowing what you last did to a client machine. At the end of each session, make notes in a client file of what you did. Date the notes so you have a running record of everything. This can also help you should a client question you on what you've already fixed on their computer.

8: Have a reliable connection

If you've ever done a remote with an end user who has a slow or bad connection, you know how frustrating that can be. Don't exacerbate the issue by having a bad connection yourself. Not only does this make your job challenging, it makes you look unprofessional and causes any given task to take much longer than it should.

9: Purchase the software you need

Don't try to get away with using the free version of Team viewer or LogMeIn. If you are serious about doing remote support, purchase a full license for the software so you aren't limited to five minutes or hindered by the lack of features found in the full version. This is your job. Take it

seriously and have the full versions of the tools you need. Besides, you should be able to write off the cost of the software come tax time.

10: Be polite… but be efficient

Do not be rude to your clients but don't spend too much billable time chitchatting with them. Yes, it's okay to chat while you're waiting for a download or a reboot, but keep it short and sweet. The more you gab, the longer the job will take. The longer the job takes the more it will cost the end user. And you know which rabbit hole that goes down.

Remote support does not have to be difficult. Your clients depend upon your being efficient and professional. Give these suggestions a try and you will find that your process smoothes out and your clients are much more satisfied.