ScreenMeet

Guide

ScreenMeet Remote Support Buyer's Guide



www.screenmeet.com

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Introduction

Selecting the right remote support software is crucial for IT teams to deliver top-notch assistance. But with countless solutions on the market, all touting robust capabilities, how do you determine what best fits your use cases and budget?

This buyer's guide will cut through the noise to highlight must-have features, pricing models, implementation considerations, the latest in innovative solutions such as AI, and top tools to evaluate. Whether supporting internal employees or external customers, read on to learn what questions to ask to select a platform allowing your IT help desk teams to efficiently and reliably troubleshoot devices remotely.

Key Benefits of Modern Remote Support Solutions

As a product owner or IT manager struggling with an outdated legacy remote support system, you know the headaches of inefficient processes all too well - lack of visibility into issues, slow response times, costly maintenance and forced upgrades that eat up your budget. Not to mention the endless frustration for your customers and staff.

What you need is a **solution designed specifically for the dynamic and distributed work environments of today while keeping within your budget.**

As you evaluate options, consider these key aspects:

- **Features** - What core capabilities like remote control, screen sharing, mobile access, and security controls are non-negotiables for your workflows?
- **Cloud-native** - Maintenance free and easy to deploy.
- **Pricing** - Will an unlimited user model or metered approach based on only active users prove more cost-effective long-term?
- **Deployment** - Can you afford lengthy implementations or complex infrastructure setups?
- **Ease of Use** - Will a steep learning curve undermine or slow user adoption and ROI?

Modern, cloud-based remote support solutions offer the most intuitive and embedded remote support on the market, engineered to boost IT productivity and efficiency across your organization while keeping costs reasonable. Secure, cloud-based architectures simplify collaboration and issue resolution without the hassle of downloads, plugins, or complex configurations.

These modern solutions streamline your workflows and resolve lingering pains:

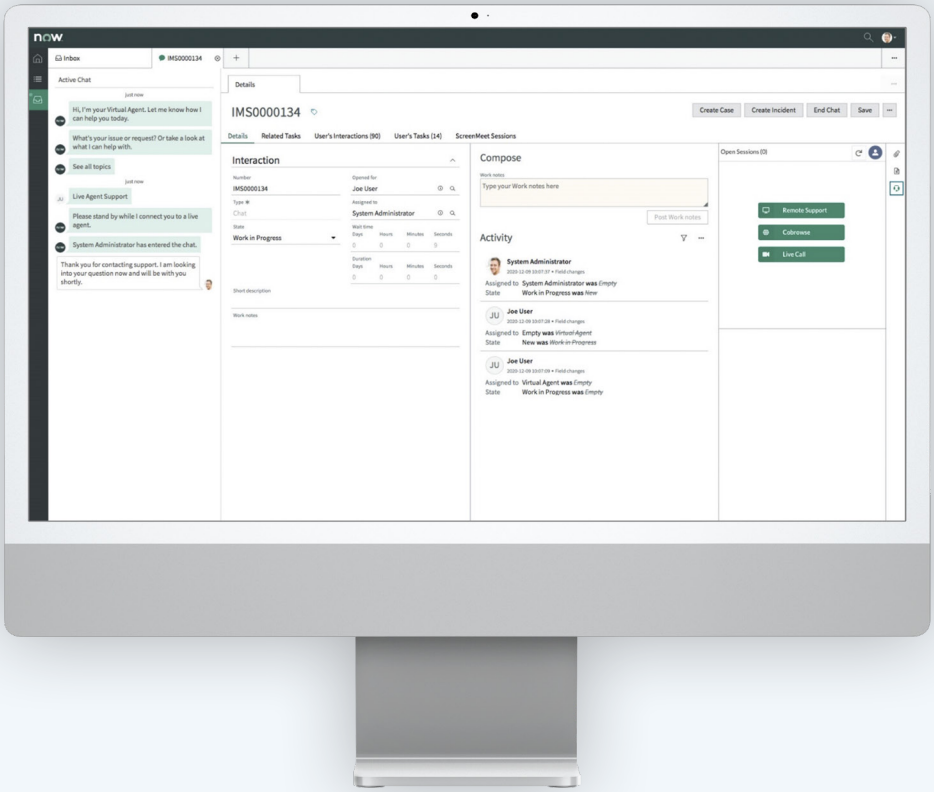
- **Improves efficiency and productivity** - SSupport teams access systems and resolve tickets faster thanks to intuitive single-click access and remote control capabilities right from tools they already use daily. No more switching contexts.
- **Reduces costs associated with on-site visits** - With robust remote access, screen sharing, and annotation features, technicians diagnose and solve issues definitively without wasting budget on driving to remote locations.
- **Enables support across distributed environments** - Globally distributed cloud infrastructure allows low latency connections so teams can collaborate across regions using remote support, screensharing, messaging, and voice and video.
- **Faster resolution of issues** - Technicians immediately connect to systems and are able to control devices remotely to accelerate diagnostics.
- **Increased customer satisfaction** - With streamlined workflows, your staff resolves tickets faster than ever before. Customers are happier getting back to business quickly.

By consolidating outdated applications into a modern singular workflow, embedded in platforms like ServiceNow, you greatly simplify fragmented processes to boost productivity and efficiency. Let your teams get back to business rather than fighting with legacy remote access solutions.

Must-Have Features and Functionalities

Fully Embedded in the ITSM Platform

A key benefit of fully embedded remote support solutions is their seamless integration with existing IT Service Management (ITSM) or Customer Relationship Management (CRM) systems. By eliminating the need to switch between applications, agents can initiate remote sessions, view and control screens in real-time, and perform deep troubleshooting tasks, all without leaving their primary workspace. This streamlined approach reduces context switching, saves time, and improves overall productivity.



ScreenMeet Remote Support embedded in ServiceNow ITSM

Embedded remote support solutions also offer advanced features such as simultaneous use of clipboard/note-taking and other tools alongside device control, providing a seamless technician experience. With robust audit logging and permission-based elevation of privileged sessions, companies can maintain confidence in their agents' ability to effectively manage access and ensure security. By opting for a fully embedded remote support solution, organizations can empower their support teams to deliver quick and comprehensive remote system control, ultimately driving faster time to resolution and enhancing the overall support experience for both agents and end-users.

Real-Time Support and Collaboration

Modern remote support solutions integrate real-time remote control, messaging, voice, and video capabilities directly into each session, eliminating the need for separate communication tools. By supporting communication channels that your employees and customers are already comfortable using, you can ensure that conversations remain contextual and relevant, fostering better understanding and faster issue resolution.

Advanced remote support platforms also offer features like integrated video calling and screen sharing, enabling support teams to provide more engaging and personalized support experiences. These capabilities allow agents to guide users through issues in real-time, offering a hands-on approach to problem-solving.

When evaluating remote support solutions, look for platforms that seamlessly integrate with your existing communication channels and offer a range of options to suit the diverse needs of your customers and support team. This multi-channel approach empowers agents to deliver efficient, effective, and personalized support, ultimately enhancing customer satisfaction and loyalty.

Remote Access and Control

Modern remote support solutions enable instant remote access and control of computers and mobile devices, allowing support agents to quickly and securely connect to remote systems without requiring agents to download temporary software. This accelerates diagnostics and issue resolution, improving overall support efficiency.

Crystal clear screen sharing is imperative for visual troubleshooting and tutorials during remote IT support sessions. Technicians should be able to not only view remote screens with full fidelity but also take control for demonstration purposes.

For internal collaboration, agents should be able to broadcast their own screens to escalation tier team members. Multi-monitor support across platforms ensures full visibility even for power users. The flexibility to both view and control screens seamlessly during a session enables robust diagnostics. With instant access and no latency, remote support teams can visualize systems nearly as effectively as being on-site.

File Transfer

Transferring files or logs back and forth is often essential for troubleshooting. A modern remote support solution should enable drag and drop file movements directly within a support session for utmost efficiency. Users should be able to instantly send individual files to each other with just a click while maintaining a full audit trail.

For larger batches of files, an integrated transfer session that queues up uploads and downloads is essential, ensuring they can complete worry-free even if connectivity drops temporarily.

Support agents should be able to pull essential log bundles from servers, while users can provide screenshots, videos, and other diagnostic data on demand. Streamlining the exchange of supplemental content during sessions ensures issues can be escalated or resolved without repeating steps.

Recording and Playback

Cloud recording storage should come standard with a modern remote support solution to retain support session history for quality assurance. Recordings should capture screen activity, annotations, chat/voice conversations, and user permissions to recreate sessions down to the last detail. Support reps should be able to replay interactions to confirm steps taken while diagnosing particularly complex issues.

Session playback also simplifies escalation of tickets by instantly sharing the context with advanced tiers. When end users permit recording, companies should be able to retrieve sessions to showcase positive technician interactions or provide retention evidence for regulated industries. Centralized access to recorded sessions increases transparency, confidence, and opportunities for internal improvement.

Hybrid Workforce

The rise of hybrid work has transformed the modern business landscape, with employees now working from a variety of locations and using a diverse range of devices. To ensure productivity and provide effective support for this dispersed workforce, companies need remote support solutions that can accommodate the unique challenges of hybrid work environments, including the ability to connect to any network on any device.

A modern remote support solution should offer a seamless and consistent experience across all devices and platforms, enabling employees to access support quickly and easily, regardless of their location or the device they are using. Whether they are working from home, the office, or on the go, employees should be able to connect with support teams and receive the assistance they need to stay productive and resolve issues efficiently, even when connecting to different networks.

Remote support solutions designed for hybrid work environments must also prioritize security and compliance, ensuring that sensitive company data remains protected when accessed from personal devices, remote locations, or various networks. By providing a secure, reliable, and flexible support experience that meets the needs of the hybrid workforce and accommodates any network connection, companies can foster a culture of productivity, collaboration, and employee satisfaction, ultimately driving business success in the era of remote and hybrid work.

Security

When selecting a remote support solution, it is crucial to choose one that meets the highest standards for SaaS security and compliance, such as SOC2 Type 2 certification and a robust infrastructure like Amazon Web Services. The solution should utilize a zero-trust environment with role-based access controls, and principles of least privilege access to protect session data.

Support sessions should transport information using end-to-end 256-bit TLS 1.2 encryption, meeting financial services regulations. It is essential to select a solution that meets your organization's unique data compliance requirements by storing all data within your chosen platform, such as ServiceNow, or in your cloud of choice. This approach ensures compliance with regional data sovereignty mandates. Additionally, having the remote support solution embedded within the platform the agent is using eliminates the need for separate logins, cutting out unnecessary risk by managing all authentication and session management through the primary platform.

Integration and Customization

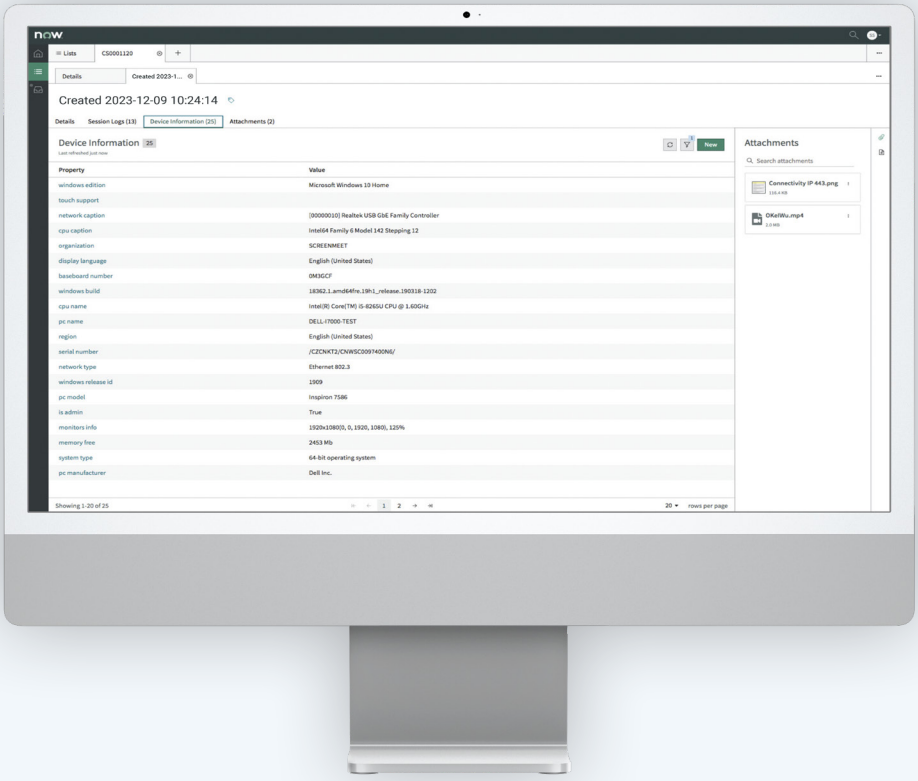
Purpose-built integrations expedite time-to-value, allowing IT teams to launch support sessions where and when needed most. A remote support solution that embeds directly within platforms like Salesforce and ServiceNow provides one-click access tied directly to existing user profiles, ensuring customers never need to leave the platform to collaborate with associates.

An open API enables limitless potential for custom integrations into complementary productivity and analytics tools. Single sign-on through your identity provider streamlines access by integrating provisioning and deprovisioning when employees change roles. Companies should retain full control to customize the remote support solution to meet their changing needs over time.

Reporting and Analytics

Comprehensive reporting and analytics give administrators insight into adoption, usage trends, and return on investment from the remote support solution. Dashboards that visualize metrics like session volume across groups, recording activation rates, and customer satisfaction scores over time are essential for informed decision-making.

The ability to export reports allows administrators to dig deeper into the raw data, while scheduled sharing to stakeholders helps keep teams informed.



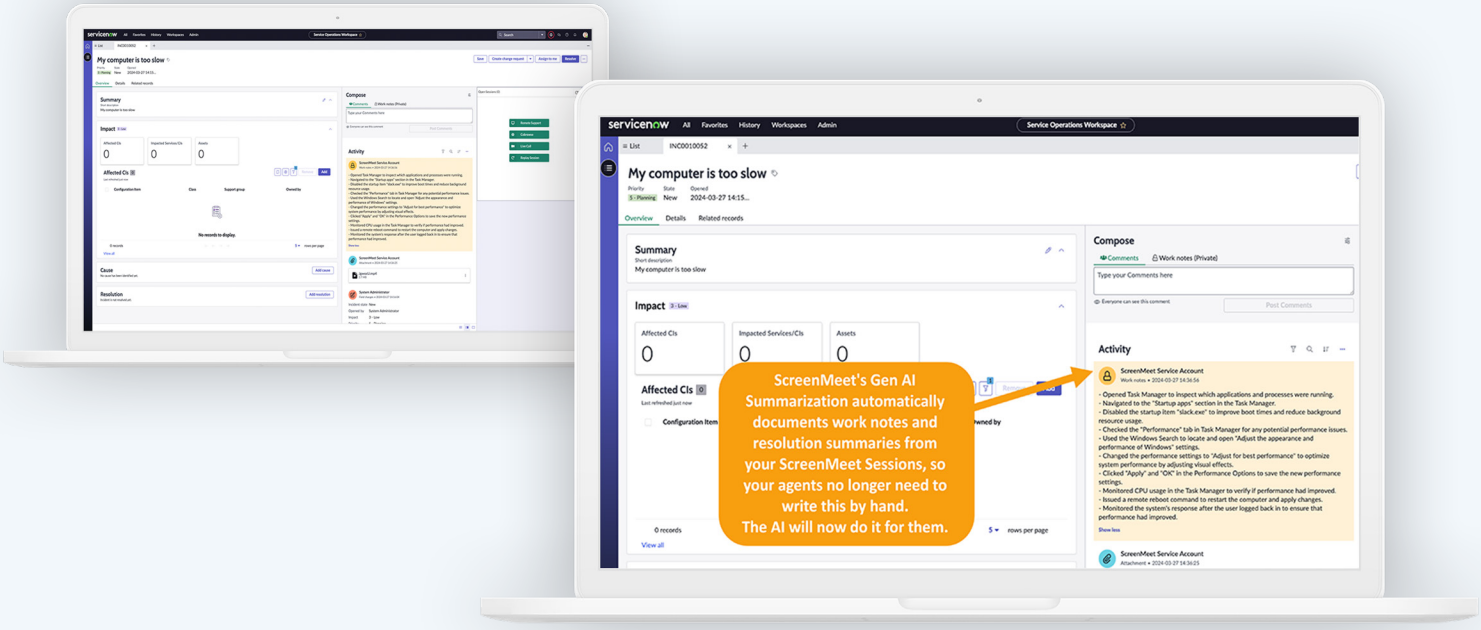
At the session level, managers should have oversight through real-time monitoring of active connections and chat content when appropriate.

A breadth of reporting facilities helps leaders make informed decisions about platform optimization. By relating usage to productivity metrics, companies can validate ROI and identify expansion opportunities.

AI-Powered Documentation

Leverage advanced AI technology and revolutionize the way agents create and manage session notes. This feature seamlessly generates detailed resolution and work notes from remote support sessions, eliminating the need for manual documentation. This not only enhances efficiency by saving agents time and reducing operational costs but also ensures that valuable information is captured accurately and consistently.

Auto-summarization also helps expand your knowledge base by automatically enriching it with data from AI-generated summaries, fostering self-service and enhancing your chatbot capabilities. With this powerful feature, your remote support team can focus on delivering exceptional customer experiences while benefiting from a continuously growing repository of knowledge.



ScreenMeet's AI Summarization helps reduce time spent by agents documenting incidents and expand your knowledge base with comprehensive resolution summaries in Activity.

Big Picture Comparison

What you need is a solution designed specifically for the dynamic and distributed work environments of today, while keeping within your budget. ScreenMeet is a cloud-native, fully embedded remote support software that seamlessly integrates with your existing platforms, ensuring a hassle-free deployment and immediate time-to-value.

When compared to other leading remote support solutions, ScreenMeet consistently outperforms across key criteria, as demonstrated in the comparison chart below. From its comprehensive feature set and cloud-native architecture to its flexible pricing and rapid deployment, ScreenMeet is the clear choice for organizations looking to elevate their remote support capabilities.

	ScreenMeet Remote Support	Legacy Remote Support Tools
Pricing Model	Usage-based, pay per technician pricing	Perpetually licensing; or Tiered pricing bands per number of technicians
Security	TLS 1.2 transport security with AES-256-bit encryption, OAuth authentication and RBAC from your ITSM platform	AES-256-bit Encryption, SSO and access controls managed in third party console
Support Options	24/7 live chat & phone support	24/5 live chat and phone; or Business hours ticketed email support
Integrations	Managed application in platform for easy integration.	APIs and plug-ins; or WHMCS and popular help desk tool integrations
Custom Reporting	Highly configurable reports + dashboards created in platform	Custom dashboard; or canned reports only
Meets Data Compliance Requirements	Session logging and sensitive data stored in customers platform or cloud storage	Data stored in vendors storage
Session Capabilities	Full remote access, file transfer, multi-technician collaboration	Self hosted or partner hosted; or full remote control and access tools
AI Capabilities	Human readable AI Summarized resolution notes	No AI capabilities
Deployment Model	True cloud-native solution	Cloud enabled using legacy infrastructure systems

Implementation Best Practices

Once purchased, follow these vital steps when deploying your selected remote support system:

1. **Rollout Strategies**
   Gradual rollout department by department often works best, allowing for testing and troubleshooting before expanding further. Consider starting with a pilot test group that includes both tech-savvy individuals and those who may be adverse to change.

   This approach provides a true sample of how the full implementation will go, allowing you to identify and address any potential issues or concerns early on. By gathering feedback from this diverse group, you can refine your rollout strategy and ensure a smoother transition for the entire organization.

2. **Training & Documentation**
   Comprehensive training and documentation are essential for the successful adoption of your remote support system. Hands-on training workshops, video tutorials, and user guides should be provided to both technicians and end users, ensuring that everyone understands the system's capabilities and how to use them effectively.

   When evaluating remote support solutions, consider whether the provider offers free training and if the documentation is easy to understand and follow. Clear, accessible resources will help drive adoption and minimize confusion or frustration among users.

3. **Integrations**
   Enabling useful integrations with other systems, such as IT Service Management (ITSM) tools, identity providers, or endpoint management software, should be done early in the implementation process. However, it's important to note that some solutions may require complex, time-consuming integrations that can delay your rollout.

   When researching remote support solutions, be cautious of providers that offer lengthy integration guides, as this may indicate a more complicated and resource-intensive process. Instead, look for solutions that offer embedded integrations with your existing platforms, as these can often be set up in a matter of hours, streamlining your implementation and allowing you to realize value more quickly.

4. **Security Policies**
   Establishing clear security policies is crucial for protecting your organization's data and maintaining compliance with industry regulations. Detail specific access request procedures, multi-factor authentication mandates, and approval chains for higher-risk actions like unattended remote access.

   Regularly conduct audits of session logs and system access to ensure that your policies are being followed and to identify any potential security gaps. By prioritizing security from the outset, you can build trust with your users and minimize the risk of data breaches or unauthorized access.

Reporting Essentials

Insights that Optimize Support

While resolving pressing technical incidents takes priority, monitoring performance metrics and user sentiment fosters continual improvement after.

Regular analysis of key indicators helps IT leaders refine processes, spotlight training gaps, and showcase ROI value to the wider business.

Here are 6 areas to consider adding into rotation for optimum support visibility:

Ticket Volumes
Segment resolved ticket totals by:
- Issue type
- Device/hardware category
- Submitting department
- Handling technician

Spot spikes and patterns.

Average Resolution Time
Compare closure rates across:
- Priority levels
- Assigned groups
- Case types

Faster is better!

Customer Satisfaction
Survey end users on:
- Overall experience
- Technician expertise
- Process efficiency
- Likelihood to recommend

Then analyze the results.

Session Logging and Recordings
Sample videos to:
- Audit processes
- Ensure protocol adherence
- Identify technician training opportunities

Device Support Usage
Track usage growth for:
- Tech access
- End user receiving
- Devices supported

Scale resources accordingly.

AI Summarization
- Automatically generate resolution and work notes from remote support sessions with AI
- Save time and money by helping your agents create better documentation for each incident
- Improve deflection by growing your knowledge base and by providing more data to Virtual Agent

Monitoring the metrics that directly correlate to user and workforce success keeps IT leaders dialed into what's working well, what requires improvement, and where future support resources should be allocated.

Adding reporting dashboards to standard operating procedures ensures maximum support, visibility, and value realization. Which metrics will you start tracking this quarter to optimize operations?

Must-Have Checklist

Review this checklist before renewing your remote support software to see if your existing vendor has the following capabilities. Doing an audit of current functionalities against modern needs ensures you don't get locked into contracts using outdated tools. You'll also avoid overspending on solutions that no longer align with business requirements.

Collaboration & Efficiency

- ☐ Embedded browser-based access
- ☐ Integrated voice, video, chat
- ☐ Screen sharing and annotations
- ☐ Custom scripting for device access
- ☐ Smart diagnostics and automation
- ☐ Auto-summarization

ITSM Integration

- ☐ Unified experiences in ITSM portal
- ☐ OAuth authentication from platform
- ☐ Automatic case attachments
- ☐ Full reporting and analytics
- ☐ APIs and extensibility

Platforms Supported

- ☐ Cross-platform (mobile, desktop, tablet, web)
- ☐ Launch directly from ITSM
- ☐ No client software required
- ☐ Email access available

Security & Compliance

- ☐ SOC2 certified
- ☐ Encryption (rest and in-transit)
- ☐ Configurable data residence
- ☐ Access and permissions controls
- ☐ Customer data separation

Deployment & Licensing

- ☐ Usage-based pricing
- ☐ Flexible scaling (up/down)
- ☐ No long-term contracts
- ☐ No deployment fees
- ☐ No maintenance fees

Key Takeaways

Providing an excellent remote troubleshooting experience requires choosing user-friendly and secure software, planning the rollout meticulously, and monitoring performance through meaningful metrics. Taking the time upfront to identify must-have features and optimal implementation methods saves hassles in the long term. With a partnered approach between the software provider and internal teams, your organization can offer more responsive IT support, enabling swift remote diagnostics and real-time collaboration with end users to resolve issues quickly.

Breaking up with inflexible legacy providers may seem daunting initially, but an intuitive cloud-based remote support solution integrated directly into your existing platforms means a transition is seamless, with improved productivity across metrics like agent efficiency, employee satisfaction, and enterprise security compliance. ScreenMeet stands out by offering a fully embedded solution that consolidates all necessary troubleshooting controls into one streamlined interface, allowing teams to act decisively without complexity. With ScreenMeet, agents can save time, be more efficient, and connect with users face-to-face to get them up and running faster.

Get a customized demo today or visit our website to see how ScreenMeet can elevate IT to the next level.



ScreenMeet

About ScreenMeet

ScreenMeet delivers better real-time online experiences, with easy, secure, and reliable voice and video calls, chat, cobrowsing, and remote support. ScreenMeet customers around the world use it to drive best-in-class customer, employee, remote work, and remote support experiences. Founded in 2016 by cloud, online meeting, and customer support veterans to build solutions to support better real-time online experiences, ScreenMeet delivers those customer, employee, and remote-support experiences for hundreds of customers worldwide.