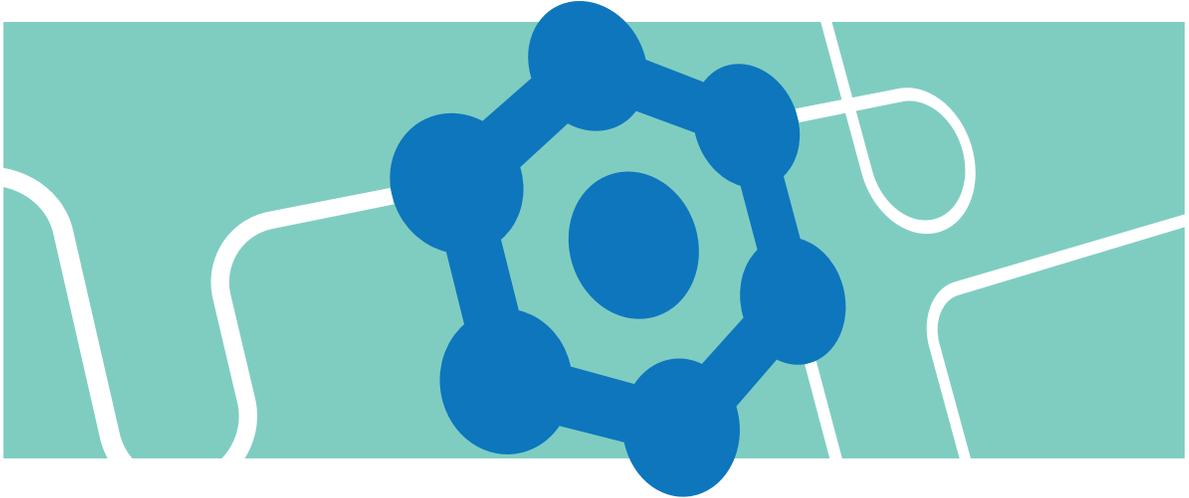# Projecting the ROI of GoToAssist

The benefits of driving service efficiency and customer satisfaction

GoToAssist is a powerful, cloud-based set of tools that drive service efficiency and customer satisfaction in a single, integrated solution.

Designed to enable support organizations to delight internal and external customers from an efficient, integrated and scalable platform, GoToAssist has been the market-leading IT help desk software six years in a row.[1]

1 IDC "Worldwide Clientless Remote Support Software 2013 Vendor Shares: Top 6 Market Share Leaders"

GoToAssist is delivered in two main modules. In this document, we will focus on GoToAssist Remote Support and Service Desk.

> **GoToAssist Remote Support** empowers IT professionals, consultants and managed service providers to quickly deliver live and unattended screen sharing sessions to users using Windows, Mac and mobile devices.

> **GoToAssist Service Desk** enables support providers to easily and efficiently manage, track and resolve issues. IT teams and help desks can leverage a robust service management tool that's simple to deploy and simple to use.

For any organization that prioritizes customer service, leveraging the GoToAssist family of products should be a priority. Most businesses, however, expect a reasonable amount of financial scrutiny before an IT investment is authorized, including an investment in GoToAssist. How can an organization determine whether a GoToAssist deployment represents a sound investment that will return value? A logical approach would be to produce a return-on-investment (ROI) analysis, often called a business-case analysis, business-value assessment or cost-benefit analysis.

This paper presents a simple overview of the business-case analysis process and demonstrates how a representative company may assess whether a proposed acquisition in GoToAssist is to its financial advantage. Technology Finance Partners, a firm specializing in producing ROI analyses, has cooperated with Citrix to demonstrate the potential economic value of GoToAssist in a specific customer environment. This paper presents a representative analysis that leverages current and projected state data based on the collective best estimates of both companies. Your costs and benefits may differ substantially from those depicted here.

Return on Investment Overview

ROIs analyses are leveraged by organizations hoping to make informed decisions about the deployment of its financial resources. Given that an enterprise likely cannot fund all possible projects under consideration, an ROI analysis is a valuable tool to promote rational decision-making about investments of a sufficient magnitude.

An accurate, transparent and conservative ROI analysis provides a good starting point for the discussion of investment opportunities. An ROI analysis is summarized in several key financial metrics that enable it to be evaluated from a dispassionate and rational perspective. The key financial metrics provided within an ROI analysis enable decision-makers to make informed investment decisions that are most likely to be in the company's best interest.

A typical ROI analysis occurs in four steps:

1. **Forecast benefits expected to be realized from the investment under consideration.**

2. **Project associated costs including internal and vendor expenditures of time and financial resources.**

3. **Map benefit and cost projections over a reasonable time horizon (typically five years).**

4. **Calculate key financial metrics that take into account the magnitude and timing of projected benefits and costs.**

An ROI Analysis for GoToAssist

Background

For the purpose of building a representative ROI analysis for an organization considering an investment in GoToAssist, let's create an imaginary company. Global Software is a U.S.-based provider of project management software with 120 employees worldwide, most of whom are engaged in the development and support of its flagship project management products.

Global Software prioritizes effective customer service as a core value. When technical issues or usability concerns arise, it takes whatever action is necessary to respond to the questions promptly and completely. However, such responsiveness has proven to be a significant cost driver. Over the years, the cost of customer support has increased at a rate higher than that of revenue, and senior management is actively looking for ways to control costs without compromising quality customer service.

The company's CIO asks Kim Brown, an IT manager at Global Software, to produce a business case to inform the proposed investment in GoToAssist. Kim consults several colleagues and determines a list of eleven potential use cases, four of which she attempts to quantify as benefits.

Following the best practices documented by Technology Finance Partners, Kim projects three scenarios representing a range of potential benefit — conservative, likely and optimistic. In doing so, Kim builds her credibility by acknowledging the inherent uncertainty of projecting future events. In her ROI document, Kim groups a qualitative description of the benefit alongside a transparent and well-sourced depiction of all data, as we see below.

1. Forecast Benefits

The first benefit that Kim quantifies relates to the ability to diminish the number of technician-handled calls with GoToAssist.

Benefit #1: Increased Self-Service

With GoToAssist Service Desk, external customers and internal help desk callers may consult the knowledge base to resolve issues themselves. The portal also enables customers to track incident progress, and once their incident is resolved, they can rate the service. Thanks to GoToAssist, fewer calls remain that require technician time.

| Metric	Conservative Scenario	Likely Scenario	Optimistic Scenario	Data Sourcing & Comments
Total technician-handled calls / year	85,612	85,612	85,612	Per CS EOY report
Calls deflected with self-service enabled by Citrix GoToAssist	5%	7.5%	10.0%	Per internal analysis
Calls deflected with self-service enabled by Citrix GoToAssist	4,281	6,421	8,561	= Calls X deflection
Cost per technician-handled contact	$8.21	$8.21	$8.21	Per CS EOY report
Annual Associated Value	**$35,145**	**$52,718**	**$70,291**	**= Deflected calls X cost per call**
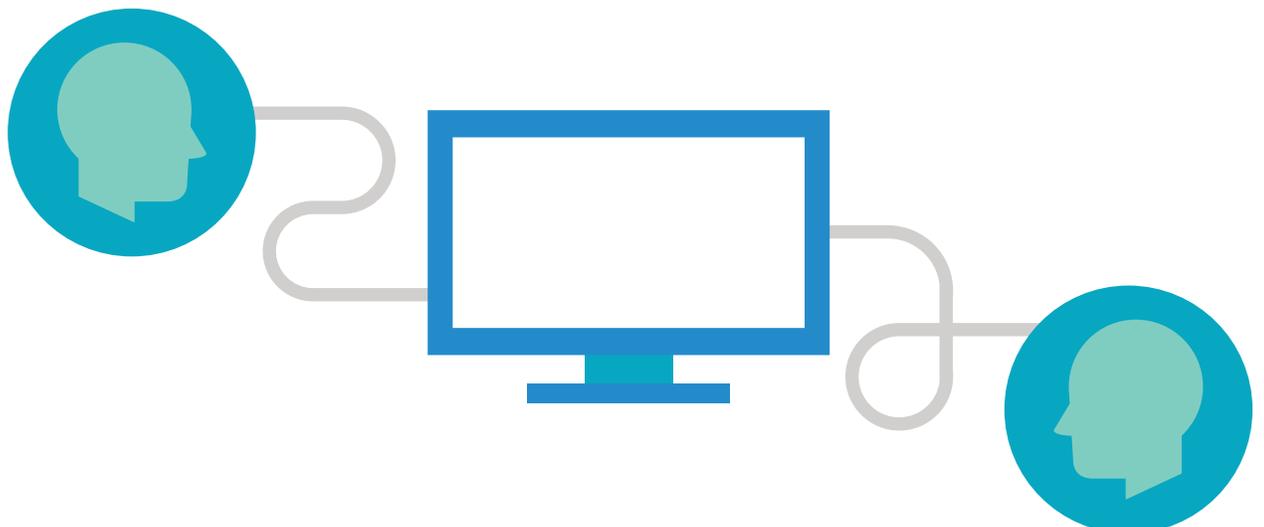
The second benefit that Kim quantifies relates to reduced handle time on some of the calls that remain after self-service calls have been removed.

Benefit #2: Reduced Handle Time

GoToAssist Service Desk and Remote Support modules enable technicians serving external customers and internal help desk callers to assess incoming requests and to leverage insight gained from previous incidents to resolve customers' issues as quickly as possible. As a result, handle time per incident is reduced.

| Metric	Conservative Scenario	Likely Scenario	Optimistic Scenario	Data Sourcing & Comments
Technician-handled calls / year (after improved self-service)	81,331	79,191	77,051	Per CS EOY report
% of calls with potential for faster handle time	40%	50%	60%	Per internal analysis
Calls with potential for faster handle time	32,533	39,596	46,230	= Calls X % with potential
Technician handle-time savings per affected call (minutes)	1.25	1.25	1.25	Per internal analysis
Technician time saved/ year (minutes)	40,166	49,494	57,788	Calls with potential X saving
Avoided cost per minute	$0.77	$0.77	$0.77	Per CS EOY report
Annual Associated Value	**$31,449**	**$38,276**	**$44,690**	**= Deflected calls X cost per call**
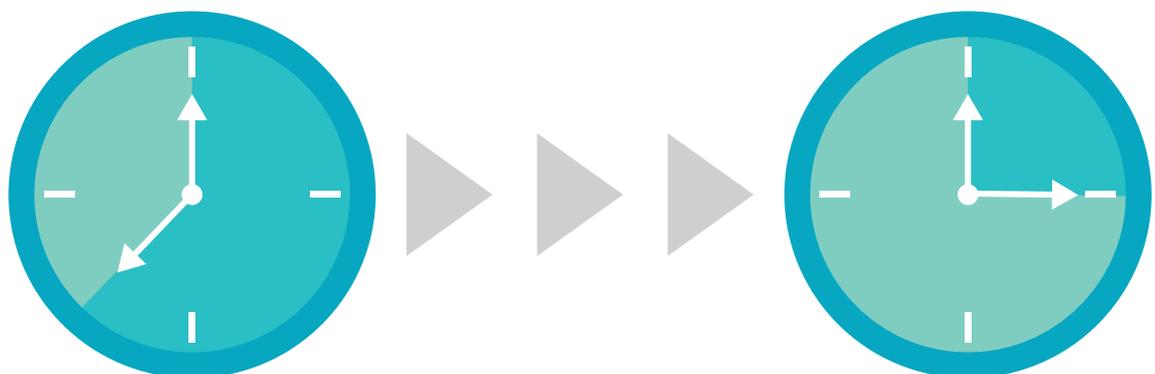
Next, Kim projects the revenue impact of providing better customer service.

Benefit #3: Improved Customer Retention

By leveraging the capabilities of GoToAssist Service Desk and Remote Support to resolve customer issues quickly and to exceed expectations relating to support issues, Global Software may retain certain customers who might otherwise be lost to competition.

Metric	Conservative Scenario	Likely Scenario	Optimistic Scenario	Data Sourcing & Comments
Number of tier 1-tier 2 customers	39	39	39	Per client services
Current YOY retention rate	85%	85%	85%	Per client services
Improvement in retention with GoToAssist	2%	4%	6%	Per internal analysis
YOY retention with GoToAssist	87%	89%	91%	= current + improvement
Additional customers retained / year	1	2	2	= difference in retention X customers (rounded)
Average annual margin per tier 1/2 customer	$62,500	$62,500	$62,500	Per finance
Annual Associated Value	**$62,500**	**$125,000**	**$125,000**	= Ad'l customers X margin
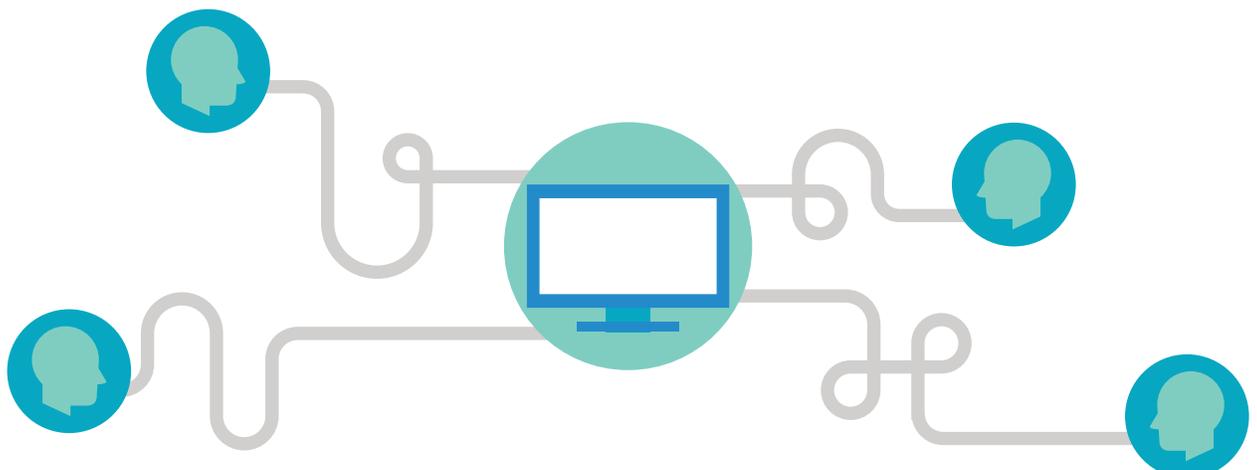
Finally, she evaluates the value of reducing the frequency of occasions in which travel is required to support a customer service issue.

Benefit #4: Reduced Travel Costs

GoToAssist offers powerful customer support capabilities, including the ability to access unattended machines for emergency work or for routine maintenance and mobile device remote support. By converting certain incidents from ones that had required travel to remote support, Global Software could avoid related travel expenses.

Metric	Conservative Scenario	Likely Scenario	Optimistic Scenario	Data Sourcing & Comments
Number of support cases / year requiring live presence	23	23	23	Per CS EOY report
Reduction in support cases req. live presence with GoToAssist	5%	10%	15%	Per internal analysis
Reduction in cases requiring live presence / year	1	2	3	= Number of instances X % reduction (rounded)
Average travel costs / instance	$11,300	$11,300	$11,300	Per corporate travel
Annual Associated Value	**$11,300**	**$22,600**	**$33,900**	= Reduction X average costs

2. Project Costs

Kim projects the costs associated with GoToAssist. As a cloud-based solution, GoToAssist is available to any authorized user with a web connection; there are no additional installation, maintenance or support costs associated with GoToAssist.

The GoToAssist modules are available individually or as a complete solution. For Kim's business case for Global Software, the requirement is for twelve seats of GoToAssist Remote Support and Sales Desk.

3. Map Benefits and Costs Over Time

Kim then projects costs and benefits over five years taking into account the time expected to fully train users and the expected growth of the business. The values below are derived from the conservative benefit scenario described above. Kim would likely review all three scenarios with her management to provide the most complete review of the possible outcomes of a decision to purchase GoToAssist.

Projected Benefits (Conservative)	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Benefit #1: Increased Self-Service	$28,995	$36,903	$38,660	$40,417	$42,174	**$187,149**
Benefit #2: Reduced Handle Time	$25,945	$33,021	$34,594	$36,166	$37,739	**$167,465**
Benefit #3: Improved Customer Retention	$51,563	$65,625	$68,750	$71,875	$75,000	**$332,813**
Benefit #4: Reduced Travel Costs	$9,323	$11,865	$12,430	$12,995	$13,560	**$60,173**
Total Benefits	**$115,825**	**$147,414**	**$154,434**	**$161,453**	**$168,473**	**$747,599**

Estimated Costs	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Software-12 seats of GoToAssist Remote Support and Service Desk	$16,992	$16,992	$16,992	$16,992	$16,992	**$84,960**
Total Estimated Investment	**$16,992**	**$16,992**	**$16,992**	**$16,992**	**$16,992**	**$84,960**

Net Benefit	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Net Benefit	$98,833	$130,422	$137,442	$144,461	$151,481	$662,639
Cumulative Net Benefit	**$98,833**	**$229,255**	**$366,697**	**$511,158**	**$662,639**	

4. Calculate Key Financial Metrics

Kim provides key financial metrics to her management for all three benefit scenarios. Key financial metrics take into account the projected positive and negative cash flows (calculated above) resulting from a business decision and summarize them in a specific, usable way. The most commonly used key financial metrics are:

Net Present Value: The total of all expected positive and negative cash flows expressed as a single, net value in today's dollars (or other currency).

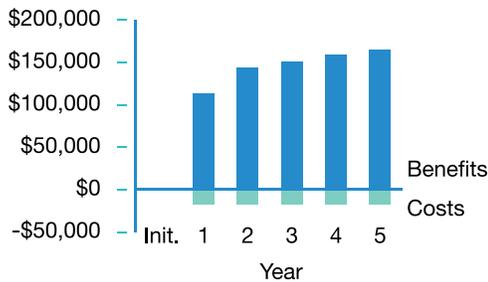**ROI**: Net benefits, or total benefits minus total costs, all divided by total costs.

Payback Period: The length of time required for the cumulative value of benefits earned to permanently exceed the cumulative value of costs.

Kim presents the three scenarios to her management. She is pleased to see that even under the most conservative projections, GoToAssist appears to represent a profitable opportunity for Global Software.

Conservative Scenario		Likely Scenario		Optimistic Scenario	
Net Present Value	$512,437	Net Present Value	$920,034	Net Present value	$1,066,498
ROI	780%	ROI	1395%	ROI	1617%
Payback Period	3 months	Payback Period	2 months	Payback Period	2 months

Finally, Kim presents a graphical depiction of the net cash flow across all three scenarios and other charts to support her business case. Often graphs are clearer than tables of numbers to depict the projected value of an investment.
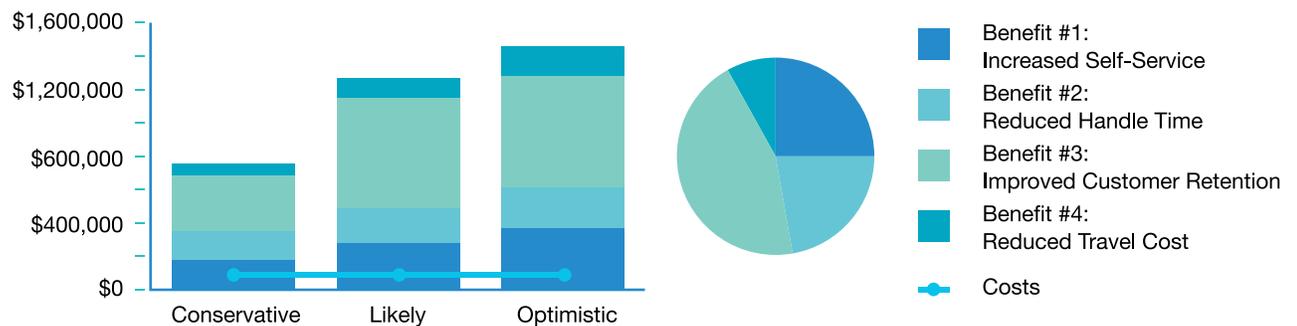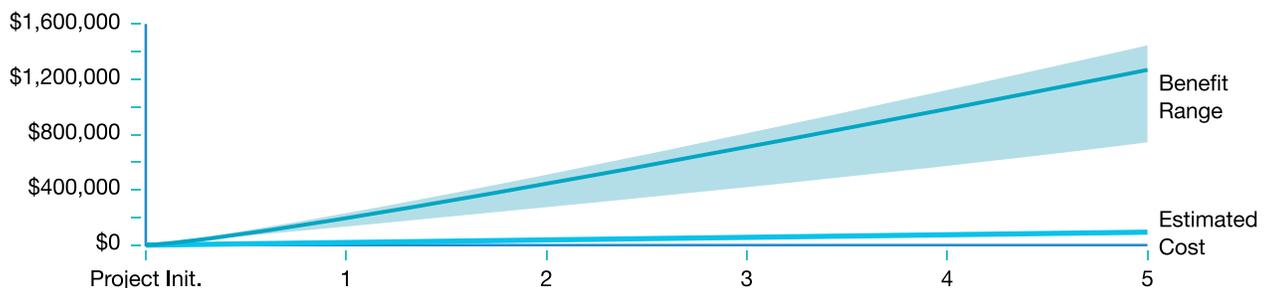
Annual Invest Costs/Benefits

$200,000
$150,000
$100,000
$50,000
$0
-$50,000

Init. 1 2 3 4 5
Year

Benefits
Costs

Payback

$700,000
$500,000
$300,000
$100,000
-$100,000

Payback at approximately 3 months

12 24 36 48 60
Months Since Deal Signing

Distribution of Benefits

$1,600,000
$1,200,000
$600,000
$400,000
$0

Conservative   Likely   Optimistic

Benefit #1:
Increased Self-Service

Benefit #2:
Reduced Handle Time

Benefit #3:
Improved Customer Retention

Benefit #4:
Reduced Travel Cost

Costs

Projected Benefits of GoToAssist vs. Estimated Costs

$1,600,000
$1,200,000
$800,000
$400,000
$0

Project Init.   1   2   3   4   5

Benefit Range

Estimated Cost

The potential acquisition of GoToAssist appears to be a sound investment for Global Software. Kim has performed due diligence with care and transparency, and the potential for GoToAssist to create value for the company is clear.

About the Data

This analysis was designed to compare the estimated solution costs to anticipated future benefits using a representative company, but it does not guarantee specific results. Your actual costs and benefits may vary. Citrix Systems, Inc. and Technology Finance Partners make no representations that these results will be achieved.

The estimated financial impact from this analysis is the output of collaborative sessions informed by the collective experience and insight of Citrix and Technology Finance Partners. All data is to be interpreted as that of a single, fictional software company deploying GoToAssist.

Your data may differ substantially from the data presented herein. Please contact Citrix to produce a customized analysis based on your own business metrics to estimate the potential financial impact of the GoToAssist in your environment.

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For more support and IT management strategies and tips, visit The GoToAssist blog.