Today's enterprise datacenter must handle more requirements than ever before, connecting distributed ecosystems of employees, partners, suppliers, and customers. These connections culminate in a very complex hybrid IT environment that needs external support assistance.

Transformational Trends in IT Support Services: What Enterprises Need

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Introduction

Today's enterprise datacenter must handle more requirements than ever before. The IT infrastructure is the foundation for connecting distributed ecosystems of employees, partners, and suppliers. Today's systems need to be designed to handle increasingly mission-critical workloads and applications that drive business operations, productivity and, ultimately, revenue growth. The changing nature and velocity of business, the pace of technology innovation and enterprise adoption of cloud-based IT services, and the pressures of digital business transformation are converging to elevate the importance of agile, cloud-ready systems. These factors culminate in a very complex hybrid IT environment, and with that complexity comes the need for external assistance.

AT A GLANCE

KEY STAT
85% of customers stated they want to work with a vendor that has a robust portfolio of support and other value-added services.

WHAT'S IMPORTANT
Customers look for support vendors that offer the following:
» Technical expertise
» Proactive services
» Technical account manager

What Enterprises Expect from Support Vendors

As part of a recent customer satisfaction study, IDC surveyed 1,200 enterprise customers worldwide — a sample that included IT managers and CIOs across all verticals — and interviewed 30 IT professionals about what is important to them when working with an external vendor for not only datacenter assets but also, more importantly, services. In this study, 85% of enterprises indicated that robust support and value-added services capabilities are determining factors when choosing a vendor. Services are one of the key drivers for creating a better customer experience (CX) and a high satisfaction rating, which directly correlates to customer loyalty. The following are some key features and abilities customers are looking for:

» Access to technical or support account managers who understand the customer's business and IT needs

» Fast access to a technical expert who understands the customer's IT environment

» Software support on hardware devices (operating system and orchestration layer support)

» Proactive abilities

Price/cost of support was on the list of survey responses, but it was not the highest rated, which strengthens the importance of support services and other higher-value services.

What Enterprises Need from Support Vendors

In today's business environment, CIOs and business leaders are challenged to move their enterprises to the next level through digital business transformation, thereby providing the agility required to succeed in dynamic global markets. New technologies such as augmented reality/virtual reality (AR/VR), business analytics, edge, and Internet of Things (IoT), coupled with the right kind of organizational innovation, can create new business models and drive business opportunities. To succeed, enterprises need to assess their current stage of digital transformation maturity to identify areas and capabilities that require strengthening. In addition, they should evaluate internal capabilities and maximize existing and potential third-party relationships. Survey work by IDC has found that enterprises are looking for vendors to differentiate themselves in the following areas:

> **To succeed, enterprises need to assess their current stage of digital transformation maturity to identify areas and capabilities that require strengthening.**

» **Integration and deployment.** IDC feels that the deployment of assets is one of the most critical services to optimizing the life cycle of datacenter assets. Proper deployment sets the stage to be able to track the asset properly, remotely manage the asset, retrieve and compile proactive insights about the asset's operation, and make proper decisions on when the asset needs to be retired. When IDC asked customers why they use external resources to deploy datacenter assets, customers stated that the quality of the deployment is the number 1 reason, which directly correlates to a better ongoing support experience.

» **Technical account managers (TAMs).** In conversations that IDC had with over 30 customers during the development of the *IDC MarketScape: Worldwide Support Services 2019 Vendor Assessment* report, the customers all stated that their TAM or service account manager (SAM) is the primary reason they continue to work with their vendor — and where a vast majority of the value lies with the vendor relationship. According to IDC, TAMs are one of the keys to customer success. They generally have an excellent idea of the customer's IT and, more importantly, business goals. TAMs are proactive in account management and assist with escalating issues when they occur.

» **Fast access to skilled technicians and effective communication.** This is the number 1 need customers have when looking at support features and has been for the past eight years that IDC has been surveying customers. It's important not only to have excellent engineers but also to make sure the customer gets to the right engineer on the first call promptly.

» **Proactive/predictive abilities.** Customers were more concerned about the outcome of the proactive/predictive abilities from the vendor than about what went into how they gained the insights. Customers want the vendor to gather the information and provide a list of recommendations on an ongoing basis more so than having to set up the abilities themselves. This is an area of great importance for both the vendor and the customer, enabling connectivity and creating portals where both parties can access and gain insights from proactive recommendations about performance, ticketing, and reporting.

» **Tools/automation.** In addition to the previously mentioned abilities, online tools to enable self-help, self-healing and self-optimization capabilities are another key attribute that enterprises want from their support vendor. These abilities provide benefits to the enterprise customer as well as the vendor. Self-help means the vendor may prevent a Level 1 or a Level 2 call, and the customer will be satisfied by faster resolution to an issue.

» **Education and training services.** Change today is faster, more challenging, and farther reaching than ever before. To stay competitive, organizations need to prepare their people to work effectively with digital technology.

» **Flexible consumption models.** "As a service" consumption-based offerings are beginning to dominate the market and take all the preceding abilities and bundle them into one easy monthly payment.

Figure 1 shows some of the key feature's customers want from support services.

FIGURE 1: *Top Features When Deciding What Type of Support Services Agreement to Purchase*
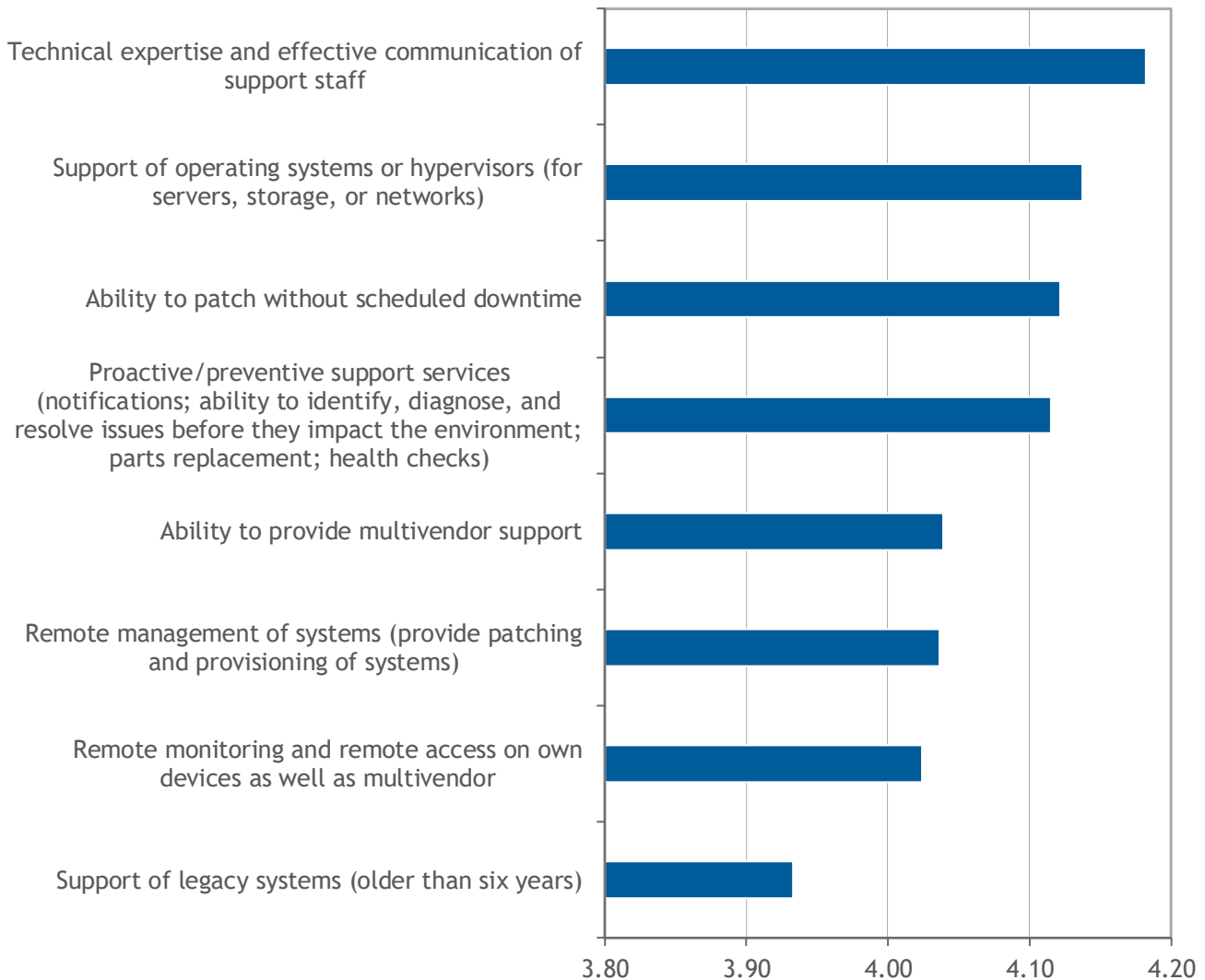
Note: Respondents were asked to rate the importance of each feature on a scale of 1 to 5, with 5 being most important.

Source: IDC's Datacenter Hardware Support Customer Satisfaction Study, 2019

What Are the Benefits of Adopting Premium Services?

Customer Experience

Infrastructure managers and CIOs are looking to provide their end users with a frictionless experience, creating multicloud offerings to enable fast access to research and development to fuel enterprise growth. In turn, vendors need to treat their IT customers the same, allowing for a frictionless relationship that drives an experience and a relationship more than just providing product and support. The customer experience should include multiple facets, such as asset life-cycle management, ongoing optimization or at least proactively letting customers know how their environment is performing and what can be done to enhance output, and making solution recommendations. Enterprise customers need real-time information and education from their vendors about best practices and how to get the most out of the solution they have purchased. As mentioned previously, one of the most beneficial services an enterprise can engage in is that of a technical account manager (or a CX manager), but all the services mentioned in the prior section will heighten the customer experience.

Business Outcomes

Business owners need to know that the partnership they have forged with any vendor is long lasting and that both parties have an interest in a positive outcome. Vendors today are more interested than ever in providing an outcome for a customer, not just a product-based relationship. Vendors and other support providers are deepening their abilities to deliver more capabilities through improved business intelligence. These newer abilities are greatly benefiting businesses with deeper insights into their IT organization, especially in complex multicloud environments. The insights and ability to better rely on internal IT and external resources for these multicloud environments will drive more business value creation.

Considerations

IDC believes the "greater cloud spending" for IT services and products will continue to grow, and vendors need to be able to assist customers on this journey. Vendors must accelerate efforts to deliver on-premises cloud-like experiences and invest to build a more robust portfolio. IDC believes this should include a mix of next-generation software as a service (SaaS)–based security and infrastructure components that can be harmonized, from a selling perspective, with a vendor's services. Customers currently spend too much time on IT tasks (see Figure 2). Enterprises should consider the higher-value support services mentioned previously to help alleviate that burden so that IT can focus on higher-value business services and outcomes.

FIGURE 2: *Time Spent on IT Tasks*

(% of time spent on IT tasks involved with supporting infrastructure)
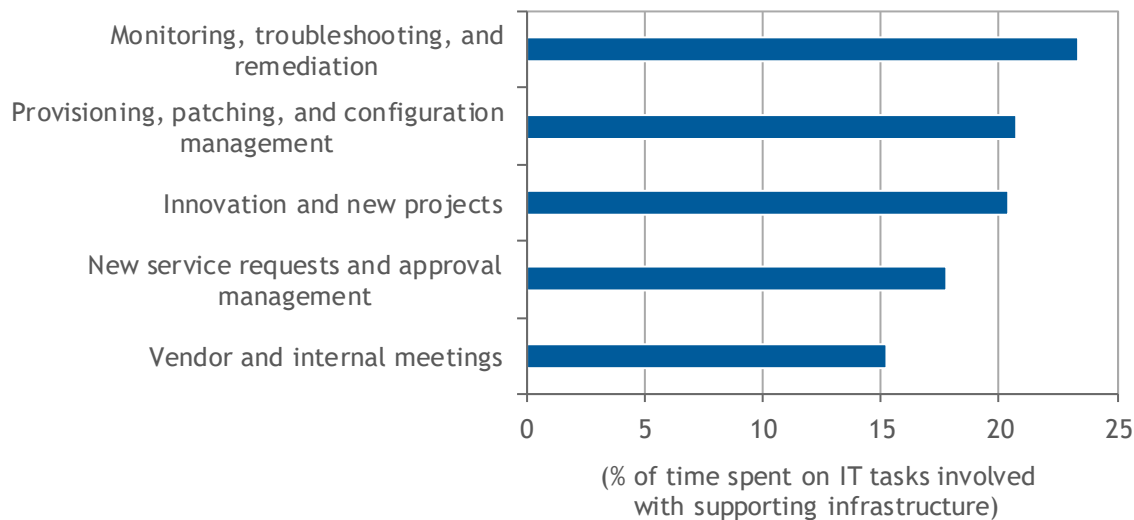
Source: IDC's Procurement Trends, 2019

IDC also expects that enterprises will need help evaluating their own internal IT capabilities as they expand their cloud and as-a-service footprint. Vendors will have the opportunity to help their customers take stock of current IT requirements, rationalize the requirements with the goals and needs of the business, and finalize a plan for digital transformation that can integrate existing and new technology solutions seamlessly. Most IT organizations are struggling to make sense of the vast number of options available across the IT landscape, and customers need to ask themselves the following question: Do we even have the right skills for today's digital enterprise? In that vein, leading service providers are well-suited to help customers make sense of the options and devise an appropriate plan, which may include a robust training program.

Conclusion

In IDC's customer satisfaction study of 1,200 enterprise customers, 85% of respondents mentioned services — particularly support services — as a key differentiator when choosing a vendor from which to purchase datacenter systems. This is a key indicator that services do matter, and one of the big differences between OEM and ODM providers is that OEMs have a robust services portfolio. This study also revealed relatively high Net Promoter Scores and whether respondents would recommend buying services from vendors.

Relationships, single points of contact, and technical account managers were specifically called out during interviews with vendor customers, who stated that those relationships are key when working with a particular provider. IDC recommends working with vendors that invest in deepening a relationship and not just selling systems. Customers should work with support providers that have well-thought-out services portfolios with a strategic direction and that help customers achieve business goals, not just product service-level agreements (SLAs).

About the Analyst

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Rob Brothers is a Program Vice President for IDC's Datacenter and Support Services program as well as a regular contributor to the Infrastructure Services and Financial Strategies programs. He focuses on worldwide support and deployment services for hardware and software and provides expert insight and intelligence on how enterprises should be addressing key areas for datacenter transformation and edge deployment and management strategies. IT hardware services covered include IoT devices, converged infrastructures, storage, servers, client devices, networking equipment, and peripherals.

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