MindLink Software
Business Critical Collaboration

The Value of Persistent Chat in Incident Management, Support and Business Continuity

A whitepaper by Mindlink Software

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Introduction

This whitepaper will introduce the Persistent Chat functionality leveraging Microsoft Lync. Combining the immediacy of instant messaging with multi-party outreach, Persistent Chat is transforming how groups and individuals communicate by facilitating real-time discussion.

This whitepaper will explain how Persistent Chat can be used effectively within Incident Management, Business Continuity & Support to share knowledge quickly, communicate more efficiently, cut resolution times and ultimately keep the business going smoothly.

With Persistent Chat, conversations can take place on a desktop (Windows, Mac or Linux), mobile, tablets, or web from any location. Completing the entire communication spectrum, Persistent Chat is designed for messages & information not to be altered or deleted, ensuring compliance for those in heavily regulated industries or those organizations that adhere to self-governance policies.

This guide is here to show you how Persistent Chat can foster collaboration, and as you'll see, it will have a major impact on your bottom line.

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A changing workplace!

In our fast-paced and globalized world, information sharing is critical. Retrieving knowledge and discussing it with colleagues around the world, no matter what team they sit in or what time zone their office is located in, has become crucial.

Yet challenges have increased: geographically dispersed teams, increasing mobility of the workforce, multiple projects, a myriad of line-of-business systems with limited integration and external information feeds (notably from social channels).

Incidents that affect multiple geographies and teams are commonalities in most enterprises. Internal processes and workflows are ever more important, and can be the linchpin to fast, accurate support and incident resolution. This puts further emphasis on ensuring communication is widely shared among team members. Regardless of the amount of planning or foresight, these processes and workflows require exception handling, in the field of business continuity more than anywhere else.
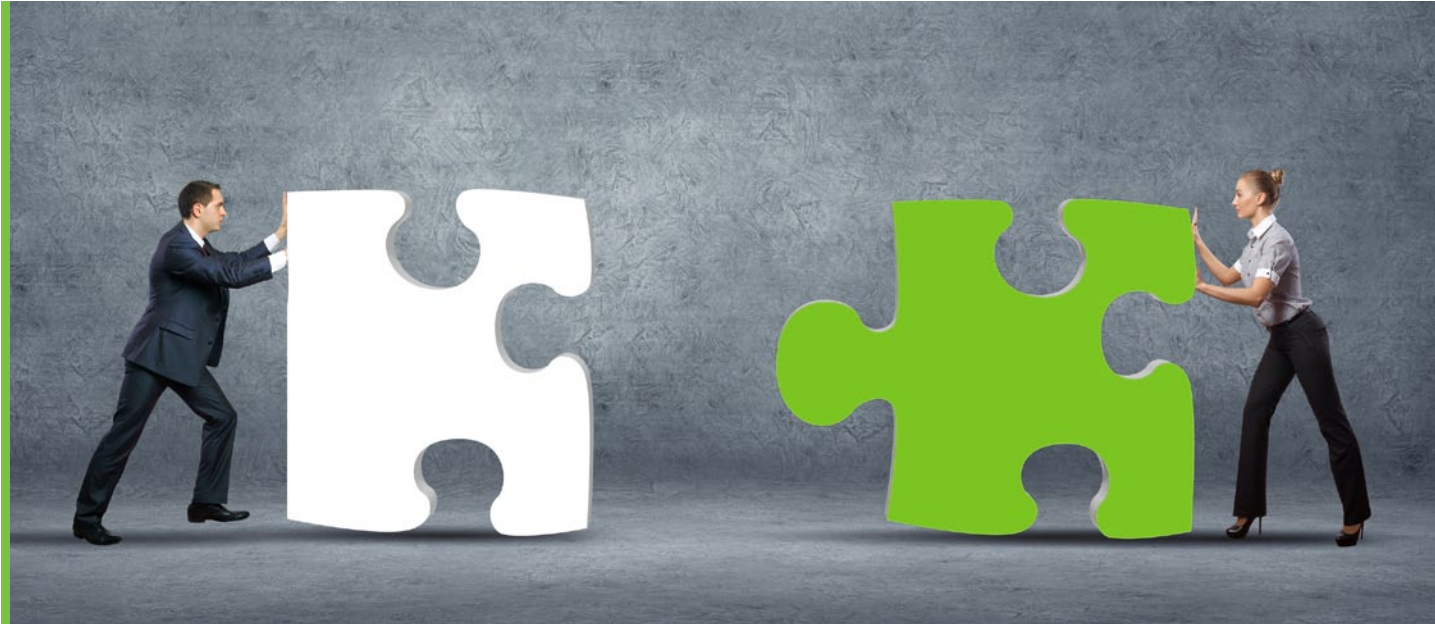
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Email is not a panacea

Various means exist to tackle these challenges, yet traditional communication tools are still the status quo in many organisations. Email being the most commonly used.

Very often when a system goes down somewhere, an automated alert is sent via Email to trigger issue resolution. Email's downside, however, is that conversations end up taking the shape of "reply-all" email threads, clogging up people's inboxes, and making it difficult to find the latest information or filtering out urgent updates among irrelevant messages

Email conversations contain a wealth of expertise which is often lost in the "black hole" of employee inboxes. Moreover, emails between teams can lead to siloed knowledge and information bottlenecks. So even if an incident has been resolved the knowledge is not shared with other teams that might encounter the exact same issue but in a different office or geography. Last but not least, Email does have some apparent security flaws making it the wrong tool for sharing of sensitive or critical data.

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The rise of collaboration tools – But which one?

Fortunately, technology has kept pace with the dramatic change in the way people share information and communicate with each other. Especially in the area of traditional telecommunication, technology is transforming into a modern way of real-time communication and collaboration.

A wealth of 'Social' and 'Collaboration' tools are now available, yet there is confusion as to which tool is right and what can be done with which application?

Many companies struggle to associate business value with bottom line impact to many of the more 'social' oriented platforms. After all 'more social' doesn't necessarily mean 'more business'. A focus on 'Business Critical Collaboration' is key, especially in the field of Business Continuity and Support.

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Persistent Chat –
The right collaboration tool

Persistent Chat is part of the
'Business Critical Collaboration' tool kit.

It can contribute to knowledge sharing in a structured and filtered way, all in real-time. Conversations can be organized according to teams, topics, incident types, support groups, geographies, categories, etc. Users can be invited to join relevant groups, to participate and engage in those conversations.

All conversations on Persistent Chat are stored, allowing knowledge to be retained as an organizational asset for future reference should similar incidents occur and need resolution. Others not partaking in the conversation at the time, can refer back to the information and easily get up to speed with the most current events. This represents a particular advantage when it comes to 'follow the sun' support models where smooth handovers between geographies and time zones are key to business continuity and ongoing support. All past information is easily searchable.

To help put all of this together and illustrate how Persistent Chat can help, the following incident management, business continuity & support use cases will show examples of how Persistent Chat can be of value. While not an exhaustive list, these examples will showcase how Persistent Chat can better advance efficient communication and productivity, while being fully compliant in highly regulated industries.

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Persistent Chat for Incident Management, Support & Business Continuity Functions

Competition in most industries is fierce. The smooth running of business processes & systems, of support functions and communication channels is hence the foundation of any business. Impact on the latter can disrupt an organization's operations, damage its reputation, deteriorate market trust and in the worst case, alienate clients.

To succeed, a firm needs a highly specialised workforce and the tools and technologies that allow them to access real-time market updates, system alerts, and internal data & knowledge repositories on the spot, and collaborate easily across teams and geographies.

After all incident management activities are aimed to identify, analyse, and correct any potential hazards and prevent a future re-occurrence, limiting any potential disruption and avoiding escalation into an emergency, crisis or a disaster.

IT Operations monitoring internal systems & responding to incidents, support teams dealing with incoming client requests, software engineers dealing with bugs while on client site with mobile devices; those are all forms of communication that Persistent Chat makes significantly easier. Extending this across the whole organisation can unlock the hidden potential of the workforce.

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Persistent Chat (PChat) supports the six basic components of incident management and makes their handling even more efficient:

1 **Incident detection & recording** – with appropriate topic channels setup for different applications, functional areas or types of incidents (network, security, hardware etc.), and with the appropriate people subscribed to those channels, system alerts or support tickets can be fed directly into the relevant group chat channels being visible to assigned teams for fast assessment. Persistent Chat sends users an alert whenever a new incident is recorded in a relevant chat channel. Now messages are sent to people instead of people having to look for messages (e.g. in Email) significantly speeding up initial support.

2 **Classification & initial support** – having been alerted that a new incident needs attention, team members can immediately share knowledge & information relating to the case and/ or search the chat channel for previous, similar incidents

3 **Investigation & diagnosis**

4 **Resolution & recover**

5 **Incident closure**

} The chat channel serves as the single place for discussion and serves as the main interface towards technicians, support staff and other groups within the organization. A smooth handover between cross-functional teams in different geographies is guaranteed and speeds up resolution. An advanced API ensures that any system updates and alerts are automatically fed into the chat room during the investigation. This can also include external social media feeds to monitor potential media or customer sentiment. All actions are recorded on the channel and are available for future reference

6 **Ownership, monitoring, tracking, communication** – Persistent Chat allows you to solve issues via free-flow knowledge sharing in a structured environment. Chat channels can be set up for internal parties to keep them informed on the progress of incident resolution. It greatly decreases Email traffic triggered by Account Managers or Senior Directors enquiring about the issue and free up time for the actual resolution of the issue. The same can be done for external parties where a chat channel can be created to keep them informed and proactively communicate with those parties.

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Here are some use cases by various topics:

IT Operations

IT Operations comprises all processes, services and systems that are provisioned by IT to run themselves as a business. In case of a system failure, automated alerts can be sent directly into a chat room and resolution can begin. Piping alerts into specific chat rooms based on topic or system errors allows the relevant individuals to pick up the case immediately. Similar cases might already have occurred elsewhere in the business – Persistent Chat lets you search for any previous cases right within the chat channel to speed up diagnosis. Integration with social feeds keeps members abreast of media or client sentiment while internal line-of-business applications feed data into the discussion channel. Once solved, resolution handling is recorded as an organisational asset for other teams to access and use. Persistent Chat availability on mobile devices further enhances real-time resolution due to immediate access to conversations and information, even when employees are on-the-go.

PR/ Communication Handling

In case of a serious incident, it is not only the internal teams that need to collaborate but PR & Communication departments across the globe must work together effectively to deliver a rapid response to external sentiment and questions and communicate proactively. A channel can be set up that includes all PR agencies globally to coordinate a unified message regarding the incident. Social media feeds can be streamed into those channels to closely monitor media and consumer sentiment and react immediately with appropriate actions and messaging. External channels for clients can be used to update them on resolution & progress. Similar chat groups can be set up for media & journalists to keep this vital influential group informed. Proactive information distribution helps control consumer sentiment and hence prevents reputation damage or escalation.

Software Development & Bug Fixes

There are many software development methodologies but increasingly Agile or Scrum are becoming the popular alternative to traditional project management. It helps teams respond to unpredictability through incremental, iterative work cadences, known as sprints or iterations. Agile empowers teams to continuously re-plan their release to optimize its value throughout development, allowing them to be as competitive as possible in the marketplace. Its beating heart relies upon regular, clear and transparent communication between stake holders and developers. A dispersed team can still work effectively using persistent chat where real time updates on progress can be posted into channels along with contextual tagging and critical mentions for iterations. If a developer needs assistance to complete a task they can flag this in the team chat and resources can be reallocated immediately by the project manager.

Issues are commonly tracked in a third-party tool like JIRA or a wiki. Integration is possible using the MindLink API which can be developed to recall specific tickets or issues directly into channel conversations. Channel history search can also be used to identify engineering discussions adding context to the support tickets all enriching the knowledge database supporting development.

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Support Teams

Hundreds of calls and enquiries can be coming in at any given time regarding a breadth of topics from product malfunctions to broken items or complaints about service, billing, contracts and so on. The list is endless. Yet support organisations can identify and group enquiries into core topics that people are calling in for e.g. product, service, billing. By routing calls & enquiries automatically into specifically set up topic channels with relevant support agents present on those chat groups, cases can be dealt with faster by people with specialised knowledge. As previous conversations are recorded, agents can search for similar enquiries cutting response time. If a specific enquiry can't be answered by the agent, the request can be automatically escalated to a higher level of support. This approach fosters organisational learning and ensures that knowledge is not kept in silos but available across the organisation. For clients this results in faster replies, reduced waiting time, and ultimately higher client satisfaction rates and lower churn.

Compliance

One thing we haven't discussed yet, but is a crucial factor within many regulated industries, is Compliance. Compliance mandates require the enterprise to record all conversations, making it critical that any communication & collaboration platform meets stringent regulations. Data retention is a part of regulatory compliance that is proving to be a challenge in many companies. Information communicated through Persistent Chat or IM adheres to those compliance guidelines. Knowledge and information can be shared in a secure and compliant environment with internal and external stakeholders.
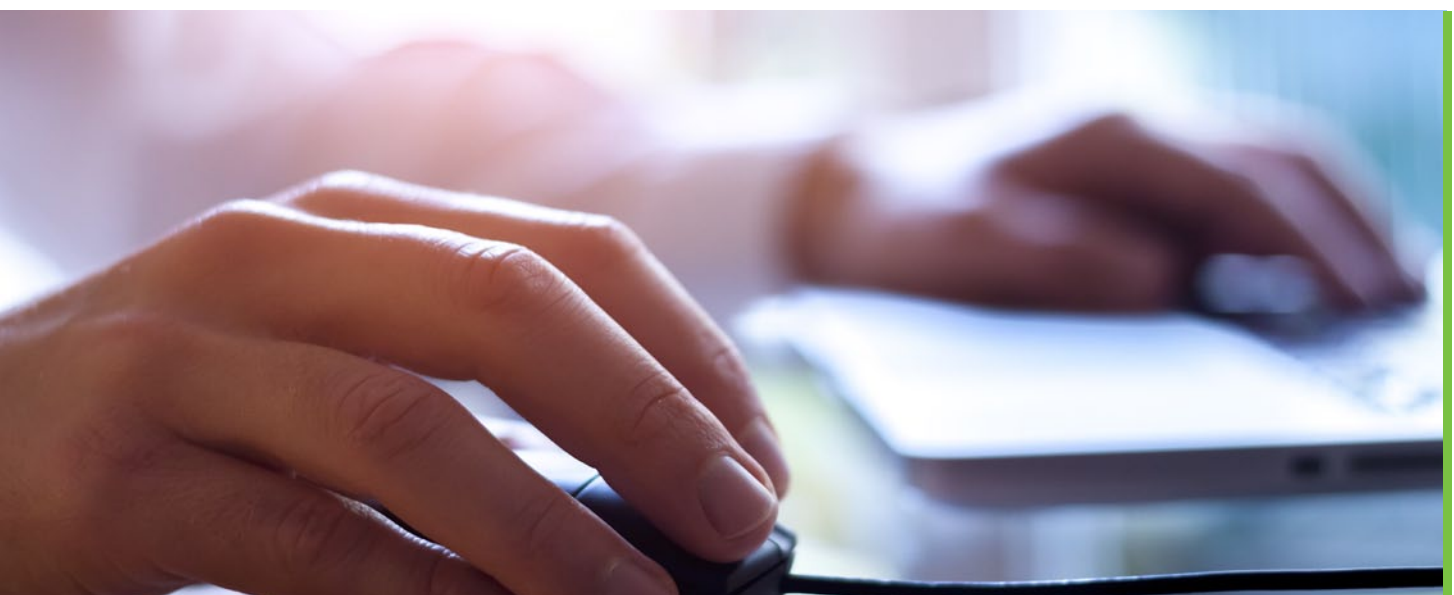
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Case Study

Martin looks after IT Operations for a logistics provider that manages transport, documents and payments for manufacturers across the globe. The multinational is a patchwork of mergers and acquisitions, many different systems stitched together by custom code. All those systems and the plumbing between them are constantly monitored by automated tools, providing regular status checks to email distribution lists.

Interdependencies between applications means the application sending the email isn't always the application with the problem. As such, it is difficult to determine whether all the critical people are on the appropriate distribution list. Some are on too few, while a lot are on too many and simply chose to ignore the deluge of emails they receive daily.

Martin tackled the problems one by one. He needed to organize incidents around topics, not email subjects - keeping the right people in the loop, without swamping them. In addition, he needed to capture each resolution method, so his team (or their counterparts elsewhere) could re-use it. All parties on a support ticket needed to be kept informed without duplication of effort, and updates on status needed to happen in a timely, easy-to-follow fashion.

He also needed an easy way to notify affected parties of progress proactively and efficiently, so that his team could spend their time focused on resolving the problem. Above all, he had to demonstrate that any solution he implemented provided genuine business value. Ultimately, it's not about incidents; it's about the company's bottom line.
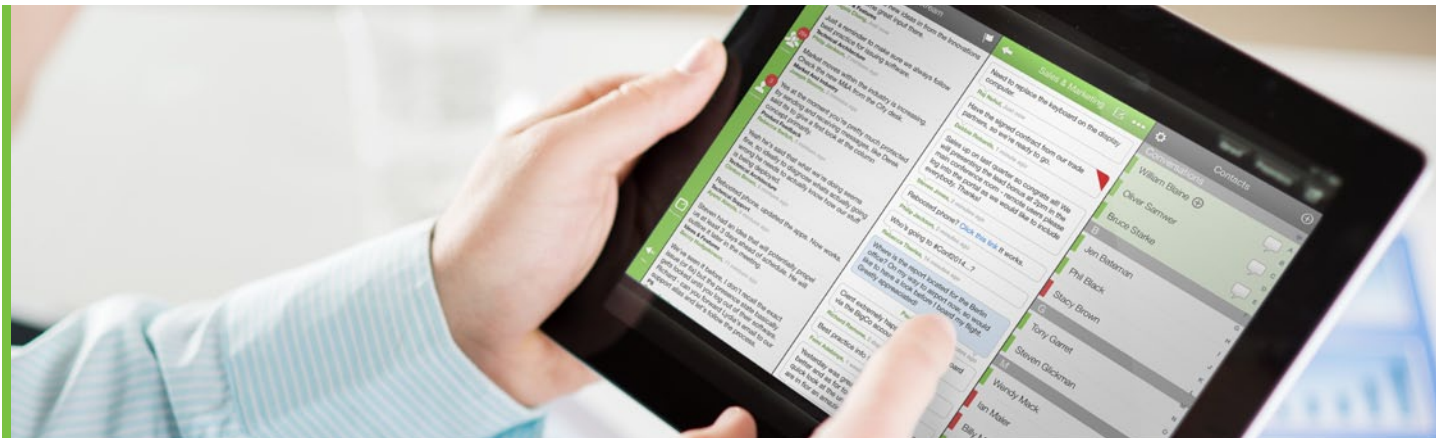
Martin had taken a look at this list of issues, and shopped around for a solution that answered all of them. He'd chosen a Persistent Chat tool built on top of Lync.

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Who is MindLink™?

MindLink Software, a best-in-class Business Critical Collaboration platform, allows real-time collaboration across the business, thus improving team efficiency & productivity.

Leveraging Microsoft Lync™, it provides IM, Presence and unique persistent Chat functionality, while being fully integrated into existing processes & systems incl. SharePoint. MindLink is secure, compliant and available cross-platform.

MindLink™ as an Enhancement to Persistent Chat (PChat)

MindLink™ turns Persistent Chat, Presence and Instant Messaging components into an all-around enterprise collaboration platform.

- Rapid information retrieval & knowledge sharing

- Real-time collaboration & decision making

- Deep process & system integration

- Compliant, Secure, Structured

- On Web, Desktop, Mobile, Tablet

- Accessible via PC, Mac and Linux

Persistent Chat with MindLink provides real business value as it translates this little-known, yet extremely powerful technology into viable solutions for the financial services industry. Specifically, Persistent Chat and its enhancements yield benefits that email alone fails to provide:

- A collaborative foundation;

- Seamless technology assimilation into the business workflow;

- Easy integration into other applications;

- Mobilisation of the workforce; and

- Communication extension to external clients, suppliers and partners.

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MindLink™ Suite

MindLink Anywhere

Persistent Chat on PC, Mac, Linux, for employees working in the office or from home, exposing PChat to external users through the web

MindLink Mobile

For an increasingly mobile workforce – PChat access via iOS, BlackBerry & Android with unique mobile features

MindLink Tablet

Persistent Chat for user of iOS, Android or Surface tablet devices

MindLink Connectors

Seamless integration of external sources and line-of business applications with Persistent Chat (Email, Social and RestFul API)

MindLink Compliance

Legally compliant storage of IM & Persistent Chat messages
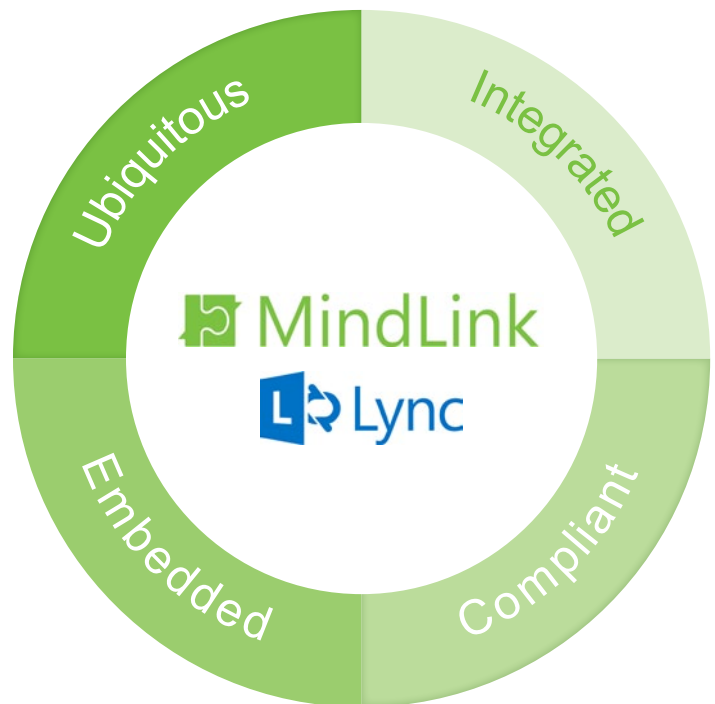
MindLink for SharePoint

Integration with portals incl. Sharepoint for easy access & adoption

MindLink Q&A

Moderated, virtual events using Persistent Chat to foster 2-way communication between employees & management

MindLink for Outlook

Integration with Microsoft Outlook for easy access of Persistent Chat within the familiar Email client

Ubiquitous · Integrated · Compliant · Embedded

MindLink — Lync

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What makes MindLink's collaboration platform unique is its wealth of features & functionalities.

Features that:

- Provide an advanced user experience

- Increase user adoption

- Enhance collaboration & information sharing

A selection of our most valuable features can be found below:

- LiveStream

- Critical IM

- # Hashtags

- @ Mentions

- Advanced Alerts

- Filters

- Intelligent Connection

- Dynamic Addins

To learn more, please visit us at www.mindlinksoft.com or follow us on Twitter @mindlinksoft

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About MindLink

MindLink is the only purpose-built Business
Critical Collaboration platform that allows teams
to coordinate and exchange vital business
information rapidly across the business.

MindLink offers IM, Presence and unique
Persistent Chat to help people work together
smarter and faster.

MindLink can be fully integrated into existing
processes & systems and is accessible on web,
desktop, mobile and tablets and available for
PC, Mac and Linux.

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