
REMOTE EXPERT

LIBRESTREAM INDUSTRY GUIDE

We've built this guide to assist teams looking for a robust remote expert solution that aligns to their digital transformation initiatives.

For further support, please contact info@librestream.com





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EXECUTIVE NOTE



JEREME PITTS, COO

We live in a world where expectations are changing. Customers expect more, workers expect more, and we continue to push our technology based on these expectations. Remote expert solutions improve customer interaction and satisfaction, employee engagement and safety, and have the potential to dramatically improve productivity, efficiency, and the bottom line of your organization.

At Librestream, we sometimes hear statements like “I see the value of remote expert guidance, but we don’t have a budget in place for it right now. How can I get this solution approved and adopted? What is the real process?”

One of the biggest challenges our champions and project managers face is gaining buy-in from key stakeholders. While the solution itself is mature, remote expert guidance is still a relatively new concept for many enterprises. The challenge in

planning for and putting value on “a new way” of doing things may seem daunting. Convincing stakeholders that the benefits outweigh the costs is crucial to gain the initial approval and adoption resource support.

With this in mind, our purpose for creating this guide was to provide a framework for defining the need, evaluating remote expert solutions, and creating a business case to gain support and adoption in your organization. We applied insights from market leaders, including innovative customers, to help create a guide that goes beyond just comparing various technologies.

The champions we work with are the future leaders of their organizations. The experience these champions bring and learn by applying digital transformation strategies to existing processes makes a real difference for their companies. Librestream has had a unique opportunity to see growth in the commercial deployment of remote expert solutions over the past 13 years and have successfully partnered with more than 500 of the largest organizations in the world.

As a champion of new digital transformation technologies like remote expertise, this guide is built for you.



HOW TO USE THIS GUIDEBOOK





As the Champion, we understand that it is difficult to know where to start when selecting a new technology. In the era of digital transformation, there are many solutions in the market which can make it difficult to select the solution that is right for your organization.

The purpose of this guide is to help you navigate through the selection and internal approval processes. This guide contains worksheets, information and insights from industry leaders to help you understand if a remote expert solution could improve results for your organization. You will also find information on managing the selection process and planning for a successful deployment.

THIS GUIDE WILL HELP YOU:

- Be an innovator within your organization
- Define the need for a remote expert solution
- Engage internal influencers early
- Build a strong business case
- Choose the right vendor
- Plan a deployment and training strategy
- Explore future capabilities

LEGEND:

-  Worksheet
-  Checklist
-  Tip
-  Link



DIGITAL TRANSFORMATION

A person in a white shirt and glasses is seen from behind, holding a tablet. The background is a blurred cityscape or office interior, all with a blue color overlay. The text 'DIGITAL TRANSFORMATION' is overlaid in white, with a thin blue line above it.



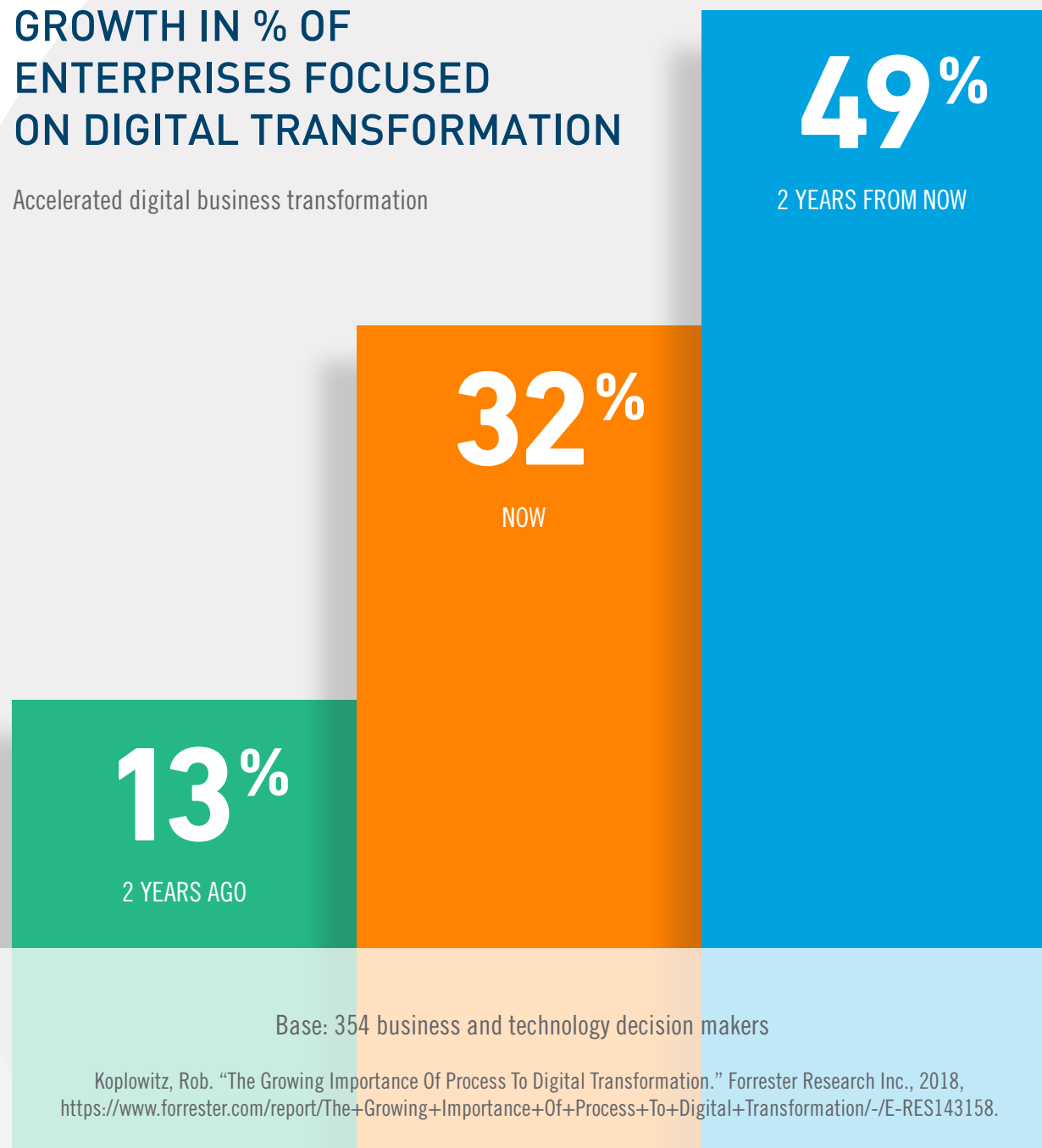
INTRODUCTION: DIGITAL TRANSFORMATION

Digital transformation disrupts the industrial landscape. New technology, the change in customer demands, and more complex processes prime the market for digitally enabled organizations. It presents opportunity for agility, new revenue models, improved customer-centric solutions and increased efficiencies within multiple areas of an organization.

Emerging new solutions and technology like augmented reality, artificial intelligence, big data, the cloud, IoT, mobilization and wearable devices are changing the competitive landscape. Leading enterprises are taking advantage of these new technologies including remote expert guidance, digital work instructions, and data analytics.

GROWTH IN % OF ENTERPRISES FOCUSED ON DIGITAL TRANSFORMATION

Accelerated digital business transformation





TRENDS DRIVING DIGITIZATION

The new digital transformation capabilities create connected worker solutions and pave the way for innovation to combat some of the most pressing issues organizations face today. These issues include:



EXPERTISE SHORTAGE

Across industries, enterprises identify the upcoming expertise shortage as a top issue. As the baby boomer generation retires and millennials join the workforce, enterprises are struggling with the resulting knowledge gap. Organizations must find ways to leverage these experts and archive their knowledge now.



COMPLEXITY OF ASSETS

The increasing complexity of equipment and processes comes with the need for highly specialized service teams. The advancement of these technologies also requires ongoing collaboration between vendors and customers to maintain and optimize assets in the field.



TRENDS DRIVING DIGITIZATION

3

ECOSYSTEM READINESS

The ecosystem of technologies and people are ready for digital transformation. Technologies such as cellular networks and smart devices are widely available. In our personal lives, we have adopted digital tools such as video chat. We now expect these kinds of tools to be available at work or from our vendors.

4

CHANGING SERVICE MODELS

Service models are moving towards business outcome based programs where revenue is attached to performance. Customers are driving this change in service model and it is crucial for suppliers to innovate in ways that allow them to proactively monitor and resolve issues rapidly.

“We are entering a new era of digital connectivity and new services technology which allows us to greatly expand the type of services we can offer, with aircraft availability a key objective.”

Tom Palmer, Senior Vice President, Services
Rolls-Royce

Rolls-Royce. Rolls-Royce opens new Airline Aircraft Availability Centre – Supporting Its “On Time, Every Time” Vision. Rolls-Royce, 6 Jun. 2018. Web.



REMOTE EXPERT

Remote Expert guidance is the ability to connect with virtual specialists immediately by sharing live video, audio, telestration and augmented content. Enterprises deploy this capability for many reasons such as improving first-time-fix rates or enabling higher value service offers to drive up revenue. For many enterprises, this live collaboration involves capturing data such as recordings and images for an improved audit trail or future training. See Use Cases.

To deploy successfully, there are many 'must have' capabilities. For example, the solution must operate in poor network environments and even allow the ability to work offline. Another critical requirement is the ability to use this solution on a broad range of smart devices including tablets, smartphones and enterprise wearables. See Capabilities.

“Real-time visual support in even the most remote locations brings a higher level of service.”

Phillippe Galan, Chief Digital Officer
Safran Helicopter Engines

Librestream Technologies Inc. Librestream Powers New Remote Assistance Service from Safran Helicopter Engines. Winnipeg: Librestream Technologies Inc, 20 Mar. 2018.



COMPATIBLE DEVICES

You need a remote expert solution that is compatible with a wide range of devices to suit your use cases. For example, a technician may use a wearable for hands-free collaboration while a customer is more likely to join using the device in their pocket or hand.

Here are the top three device categories:



SMARTPHONES & TABLETS

Already widely deployed, these devices are easily accessed and understood.



PERSONAL COMPUTERS

Commonly used by experts / users in call centers.



WEARABLES

Used for hands-free collaboration or to share specialized data such as thermal imaging.

DEFINE YOUR NEED





IS IT TIME FOR YOU TO CONSIDER A REMOTE EXPERT SOLUTION FOR YOUR TEAM?

The questions to the right capture the primary reasons we see enterprises deploy remote expert capabilities across their operations.

If you've answered yes to at least two of the questions, you are likely a good candidate for a remote expert solution.

| | | | |
|----------|---|------------------------------|-----------------------------|
| 1 | Do you foresee or are currently experiencing a loss of expertise? | Yes <input type="radio"/> | No <input type="radio"/> |
| 2 | Are your customers asking for new performance-based service models? | Yes <input type="radio"/> | No <input type="radio"/> |
| 3 | Do you have a dispersed team with varying experience levels? | Yes <input type="radio"/> | No <input type="radio"/> |
| 4 | Do you have complex assets or operations? | Yes <input type="radio"/> | No <input type="radio"/> |
| 5 | Are you working on strategies to improve metrics such as issue resolution time? | Yes <input type="radio"/> | No <input type="radio"/> |

If you've answered yes to at least two of the above questions, **you are a good candidate for remote expert.**

BUILD A BUSINESS CASE

A photograph of a business meeting in a modern office, overlaid with a semi-transparent blue filter. A man in a light-colored suit stands in the center, gesturing towards a whiteboard on the left. The whiteboard displays a line graph and a pie chart. To his right, another man in a dark suit is seated, looking towards the speaker. In the foreground, the backs of two women's heads are visible as they listen. The background shows a large window with a view of a city skyline.



HOW TO BUILD A SUCCESSFUL BUSINESS CASE

When investing in new technology, creating a strong business case for your organization is vital to the success of the project. A business case provides stakeholders with a clear document outlining your vision for the investment and its benefits.

When outlining benefits, it is critical to distinguish between the tangible and intangible benefits. Tangible benefits are commonly measured by a dollar amount. Intangible benefits are not measured by monetary terms but have considerable impact on the organization such as customer satisfaction.

It is important to highlight your goals for the project and how they align with the goals of all the stakeholders involved.



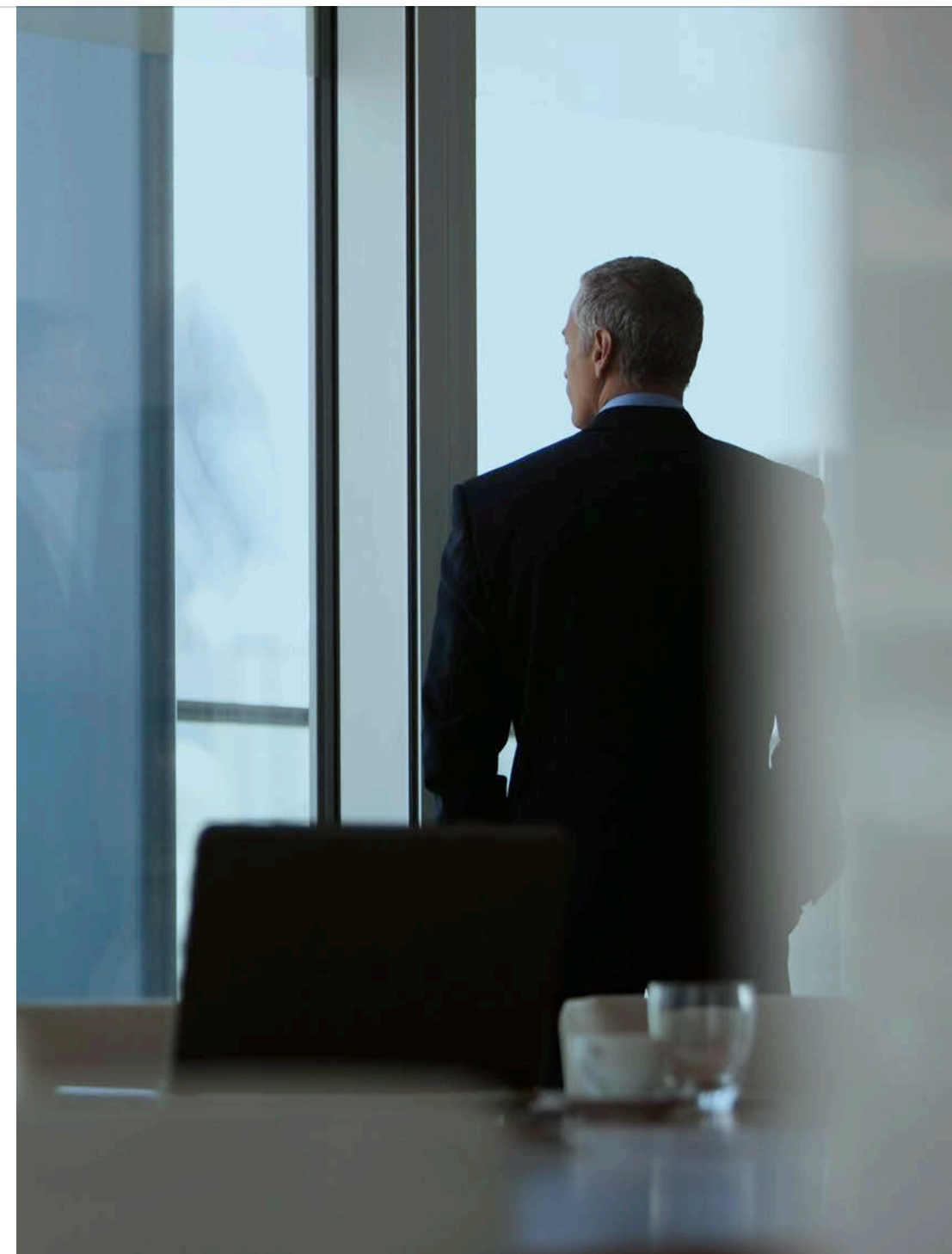


HOW TO BUILD A SUCCESSFUL BUSINESS CASE

FOR EXAMPLE:

Your goal could be to use a remote expert solution to decrease the number of truck rolls or repeat site visits (tangible benefit), which translates to an overall cost saving and productivity gain. One of your stakeholder's goals can be to reduce carbon footprint (intangible benefit). Your goal of reducing truck rolls can also impact the reduced carbon footprint.

TIP: Your organization might refer to goals as KPIs, Benefits, ROI, Outcomes. It is important to define this so you are speaking the right language to your stakeholders.





DETERMINE THE STAKEHOLDERS

Before you can complete your business case, it is crucial to know the answers to the following three questions:

WHO ARE THE STAKEHOLDER(S) AND INFLUENCER(S)?

WHAT IS THE OVERALL PROBLEM WE ARE TRYING TO SOLVE?

WHY IS IT IMPORTANT TO SOLVE THE PROBLEM?

“Surrounding that vision are all of our company standards - integrity, customer focus, continuous improvement, and so on. If you look at that mission and those principles, and then look at the capabilities this technology was going to provide our business, it was a pretty clear case.”

Todd Hesse, Product Manager
Precision Ag Technologies, Ziegler CAT

Nicastro, Sarah. “Ziegler CAT Improves Service Through Video Collaboration.” *Field Technologies Online*, 26 Sept. 2017, <https://www.fieldtechnologiesonline.com/doc/ziegler-cat-improves-service-through-video-collaboration-0001>. Accessed 19 Nov. 2018.



HOW TO BUILD A SUCCESSFUL BUSINESS CASE: TIPS

ONCE YOU HAVE ANSWERED THE PREVIOUS QUESTIONS, YOU ARE READY TO START CREATING YOUR BUSINESS CASE. HERE ARE A FEW TIPS TO HELP YOU CREATE A STRONG BUSINESS CASE:

- 1** Do you and your team have a clear understanding of the technology and how it is used?
- 2** Work with your potential vendor. They should be an excellent resource for proven use cases and benefits. They know the technology best.
- 3** Define the potential business outcomes across the organization and estimate the savings or additional revenue.
- 4** Identify the costs of the solution and calculate the potential ROI for your organization.
- 5** Not all benefits are tangible. List your organization's potential intangible benefits and how those can benefit your teams and customers.
- 6** Include successful examples of other companies who use the technology you would like to implement. Again, your vendor should be able to assist you.



POTENTIAL BUSINESS OUTCOMES

To help define the potential tangible business outcomes, we can break them down into two main categories of benefits: Cost Savings and Increased Revenue Opportunities.

COST SAVINGS MAY INCLUDE:

- Faster time to problem resolution
- Lower travel expense - this may be in the form of fewer in-person site visits, fewer last minute flights, reduced number of truck rolls
- Reduced customer service/support call length and cost
- Decreased inventory costs due to more efficient parts management, and lower shipping costs
- Avoidance of SLA penalties for downtime
- Accelerated training for new and/or less experienced service technicians
- Reduced employee turnover expenses due to happier and more productive employees





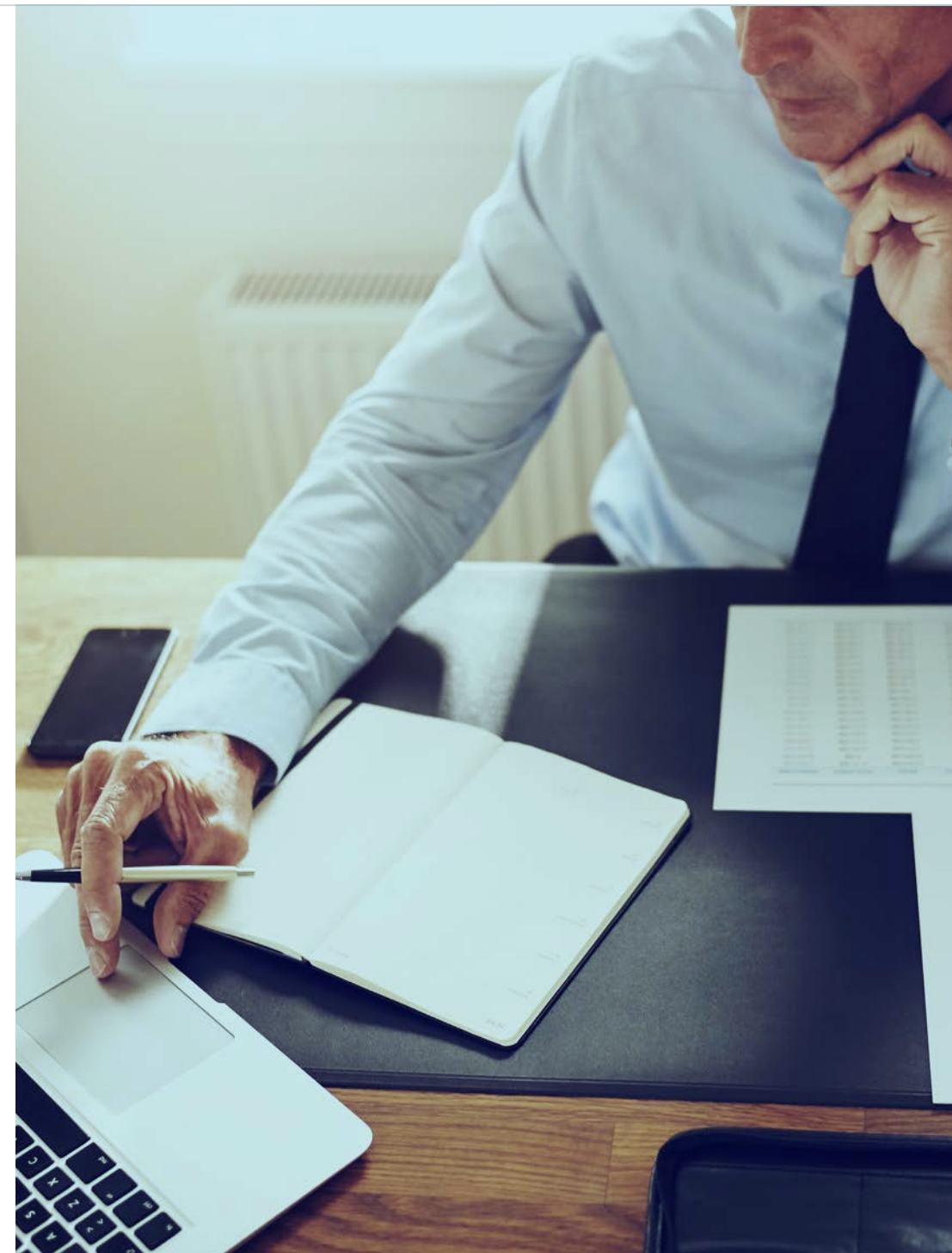
POTENTIAL BUSINESS OUTCOMES

INCREASED REVENUE OPPORTUNITIES INCLUDE:

- Increased sales due to better customer service, satisfaction and retention
- Increased sales due to new value-added customer services
- Higher employee productivity due to increased capacity to serve customers (for example - more inspections performed in the same time frame) and/or improved personnel scheduling and utilization

You likely have your own corporate metrics where you track KPIs specific to your business. Start with those KPIs when evaluating all possible outcomes.

Measurements such as improved **first time fix rates** and **reduction of time to problem resolution** are a couple of key metrics many organizations track.





POTENTIAL BUSINESS OUTCOMES

Here is a simple example:

| BUSINESS OUTCOME | Annual Quantity X | Estimated % Improvement X | Cost Per or Added Revenue X | Cost Per or Added Revenue = Total Value |
|--|-----------------------------------|--|-----------------------------------|---|
| Reduced Site Visits: e.g.: # of truck rolls | Annual total 7,400 truck rolls | Estimate 20% reduction | Average Cost \$600/ truck roll | \$ 888,000 |
| Reduction in length of support calls | 120,000 support call hours | Estimate 15% reduction | Average Cost \$30/hour | \$ 540,000 |
| Improvements in parts inventory/utilization | 4,000 wrong part errors | Estimate 20% improvement | Average Cost \$120/incident | \$ 96,000 |
| Additional service revenue (Premium plan) | \$25M current revenue | Estimate 5% upgrade to premium plan | Estimate 20% price increase | \$ 250,000 |
| TOTAL ANNUAL BENEFIT | | | | \$1,774,000 |



POTENTIAL BUSINESS OUTCOMES

You can use this worksheet as a starting point - fill out the relevant examples and add others which are specific to your business.

| BUSINESS OUTCOME | Annual Quantity X | Estimated % Improvement X | Cost Per or Added Revenue X | Cost Per or Added Revenue = Total Value |
|----------------------|-------------------|---------------------------|-----------------------------|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| TOTAL ANNUAL BENEFIT | | | | TOTAL: |



CONSIDER THE INTANGIBLE BENEFITS

To help define the potential intangible business outcomes, we listed a few common categories often considered by organizations when investing in remote expert solutions. Identifying the various intangible benefits can help you create a stronger case for your project.





CONSIDER THE INTANGIBLE BENEFITS

| BENEFITS | POTENTIAL MEASUREMENT |
|---|---|
| Increased customer satisfaction | Customer survey, customer satisfaction score (CSAT), net promoter score (NPS), social media monitoring, customer churn rate |
| Reduced carbon footprint | Mileage reports, reduced number of repeat visits |
| Modern tools that fit expectations of new generation of workers | Staff survey, employee retention |
| Knowledge base assets created with images and recordings | Volume of assets |
| Improved worker safety | Number of reported incidents |
| Accurate inventory levels via more parts verification | Inventory Management, reduction of repeat visits |
| Increased asset uptime for clients | Customer surveys, SLA reports |



CONSIDER THE INTANGIBLE BENEFITS

Use the following worksheet to list your own intangible benefits.

| BENEFITS | POTENTIAL MEASUREMENT |
|----------|-----------------------|
| | |
| | |
| | |
| | |
| | |
| | |



CALCULATING PROJECT COSTS AND ROI

Every organization approaches new technology differently including how departments work together to select and deploy. In your organization, it may be important to work with the finance department to define the final ROI. It may also be important to work with teams such as IT and security departments to understand all internal costs.

Be sure to consider all components of the project cost in addition to the initial purchase cost, such as implementation and ongoing fees. The software license fees (often on a per user basis), user training (initial and ongoing), annual maintenance, and any installation / consulting fees. These costs will vary from one vendor to another.

Once the estimated project costs are calculated, you can generate the final ROI using this cost / investment information and the above business outcome analysis. We recommend a minimum 3-year ROI calculation.

E.G. ROI = (TOTAL TANGIBLE BENEFIT X 3) - (TOTAL 3-YEAR INVESTMENT)

TOTAL 3-YEAR INVESTMENT

“We continue to invest in technologies and solutions that enable proactive and predictive maintenance and data-driven decisions that positively impact our customers’ bottom line through increased aircraft availability and reduced costs.”

Timothy Swail, Vice President, Customer Programs
P&WC

Pratt & Whitney Canada. Pratt & Whitney Canada Enhances Service Capabilities with “Virtual Presence” Customer-Collaboration Solution. Long Beach: Pratt & Whitney Canada, 6 Dec. 2016. Web.



IDENTIFY RISKS

With every new technology, there are potential risks that can impact success. In this section, we highlight three of the common risks we see organizations face with new technology deployments such as remote expert solutions.

STRATEGIC ALIGNMENT

Alignment with corporate objectives and strategies is important to long term success. Technology that relates to existing or future corporate strategies will gain top down support and budget. Check-in meetings with leadership teams can ensure that the project remains relevant. Misalignment can lead to revolving team members and budget challenges.

HOW TO MITIGATE:

1. Bring in your stakeholders early and build the project with their input.
2. Demonstrate how the project aligns with core initiatives of your organization.
3. Continue to keep regular open communications of the project with each stakeholder. Be clear on the “why” of the project and share your wins (big or small).





IDENTIFY RISKS

DATA SECURITY

Deploying a remote expert solution often involves hosted capabilities and creates valuable new data such as pictures and recordings, which comes with security and privacy requirements. It is important to understand the steps you and your vendor must take to protect this data from breaches or unforeseen disruptions.

HOW TO MITIGATE:

1. Work with internal IT and security teams early to identify data policies and safeguards.
2. Require that your vendor shares its data security protocols and policies including penetration tests.
3. Understand privacy restrictions on video recordings and image capture. Ensure you can control which users can create and access this content.

UNEXPECTED COST OVERAGES

With any project, unexpected costs can have a major impact on the continuation of the project. For example, the project may incur higher labor hours due to project delays or adoption challenges as well as unexpected variable expenses such as cellular data plan overages.

HOW TO MITIGATE:

1. Develop a list of potential cost overages and project delays. Ensure that your vendor can assist you in mitigating these risks.
2. Ensure that you have the right people involved in departments such as IT to minimize potential delays.
3. Involve groups that can assist you with adoption such as new employee training teams.

INDUSTRY USE CASES

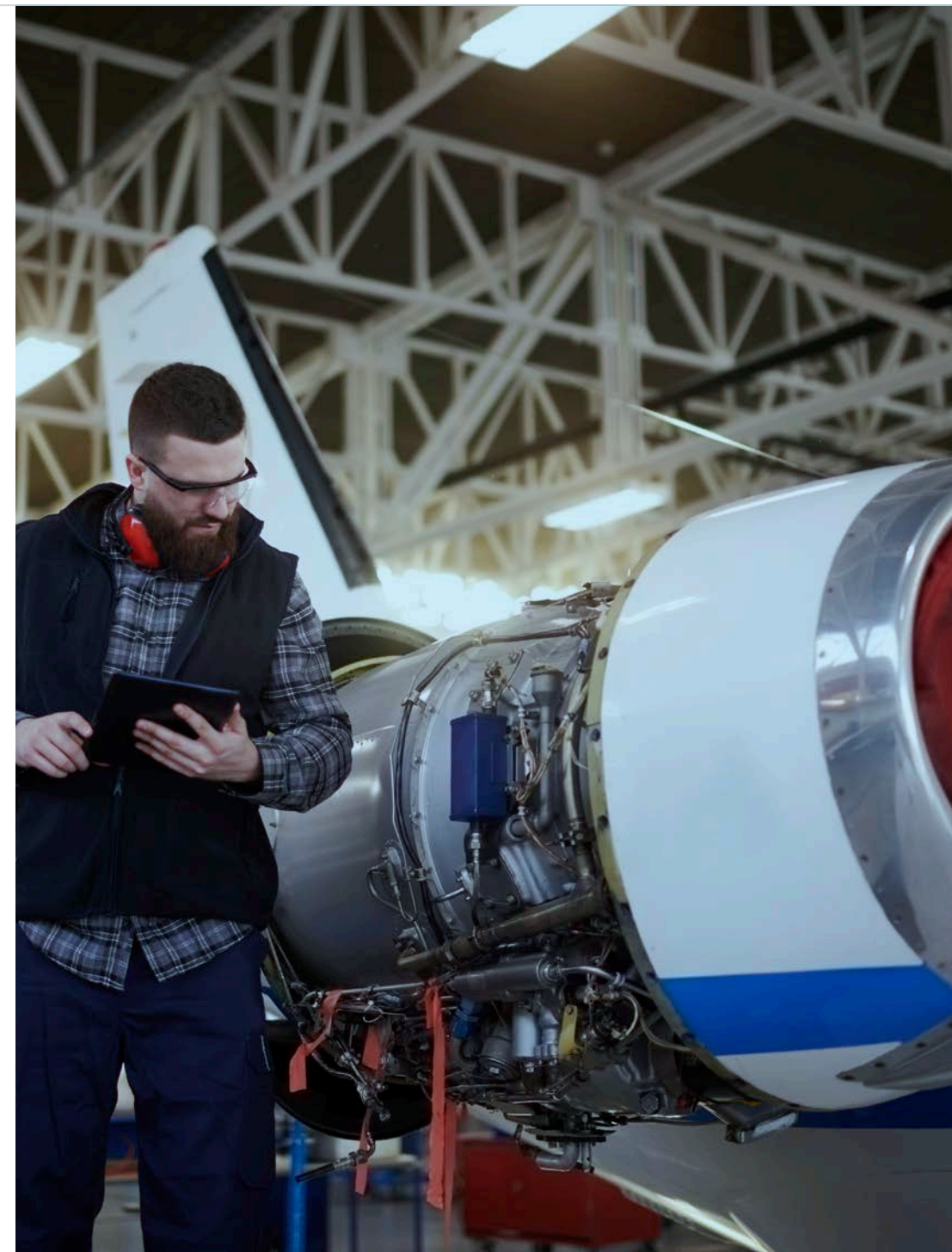




INDUSTRY EXAMPLES: REMOTE EXPERT USE CASES

There are many different ways an enterprise can use remote expert guidance within its operation. One way to describe the use case is by defining who participates – internal teams, vendors, and/or customers. We see many organizations engage in both B:B and B:C remote expert use cases.

[VIEW SAMPLE USE CASES](#)





INDUSTRY USE CASES: **B2B**

In the B:B use case, internal or external vendor specialists remotely mentor field technicians or inspectors. The most common benefits we see are in cost savings and improved service metrics.

B2B EXAMPLE: INTERNAL TECHS & VENDORS COLLABORATE

SCENARIO:

A large aerospace engine manufacturer has many technicians who work out of hangars to inspect and troubleshoot issues. When an event such as a bird strike occurs, the technician must engage specialists to assist, which can require travel time, delayed problem resolution and increased aircraft on ground time.





INDUSTRY USE CASES: **B2B**

SOLUTION:

The aerospace engine manufacturer purchased a remote expert solution to virtually bring the experts to the hangars to inspect and help guide the technician through troubleshooting the engine.

The solution included remote expert software and IoT collaboration device to share borescope visuals.





INDUSTRY USE CASES: **B2B**

RESULTS:

Using a remote expert solution, this aerospace engine manufacturer improved response times by 12 hours and reduced aircraft-on-ground situations by 60%.

These tangible results also provide a range of intangible impacts including higher customer satisfaction and staff productivity.

60%



INDUSTRY USE CASES: **B2C**

In the B:C use case, clients engage directly with the manufacturer or service company to improve adoption of the equipment or expedite services. In this application, we see many manufacturers offer a premium service plan due to the added value.

B2C EXAMPLE: TEAMS COLLABORATE DIRECTLY WITH CUSTOMERS

SCENARIO:

An agriculture equipment dealer has a central location for all its equipment experts and a team of field service representatives. These field service reps visit customer locations when there is a problem with the equipment.





INDUSTRY USE CASES: **B2C**

SOLUTION:

To help reduce truck rolls and accelerate service, this dealer invested in a remote expert solution. In many cases, they use live video to connect their field service representatives directly with customers. The customers are invited as guests to join a remote expert session from their mobile device to visually show the remote support personnel the issues.

In some cases, the customer can validate replacement parts required to improve first-time-fix rates. In other cases, no trip is required as the issue is solved immediately.





INDUSTRY USE CASES: **B2C**

RESULTS:

By using a remote expert solution, this dealership reduced their service call length by 50% and accelerated resolution time by 20%. These savings are creating a differentiated service for this dealership and providing a higher value customer experience.





DEFINE YOUR USE CASES

As we mentioned in the beginning of this chapter, defining your use cases is a very important part of a business case. You can use the following templates to build two separate uses cases for remote expert guidance within your organization. These may involve customers directly or focus more on internal collaboration.

Where can you embed this new capability as part of your daily workflow? Embedding this capability can often add up to the highest overall value for your operation.

[VIEW ZIEGLER USE CASE](#)

[VIEW SGS USE CASE](#)

WHO DOES IT INVOLVE?

WHAT IS THE PROBLEM?

HOW DO YOU CURRENTLY SOLVE THE PROBLEM?

HOW WOULD YOU SOLVE THE PROBLEM WITH REMOTE EXPERT?

WHAT WOULD IT SAVE OR IMPROVE?



DEFINE YOUR USE CASES

Do you have high cost/value situations where this capability can provide strong value? While the frequency of use may be lower, the value from each incident is typically high.

[VIEW SAFRAN USE CASE](#)

TIP: Understand the difference between how you currently solve the problem versus how you can use remote expert to improve results.

WHO DOES IT INVOLVE?

WHAT IS THE PROBLEM?

HOW DO YOU CURRENTLY SOLVE THE PROBLEM?

HOW WOULD YOU SOLVE THE PROBLEM WITH REMOTE EXPERT?

WHAT WOULD IT SAVE OR IMPROVE?

CHOOSE THE RIGHT VENDOR

A blue-tinted photograph of two business professionals shaking hands over a desk in an office setting. The image is used as a background for the text.

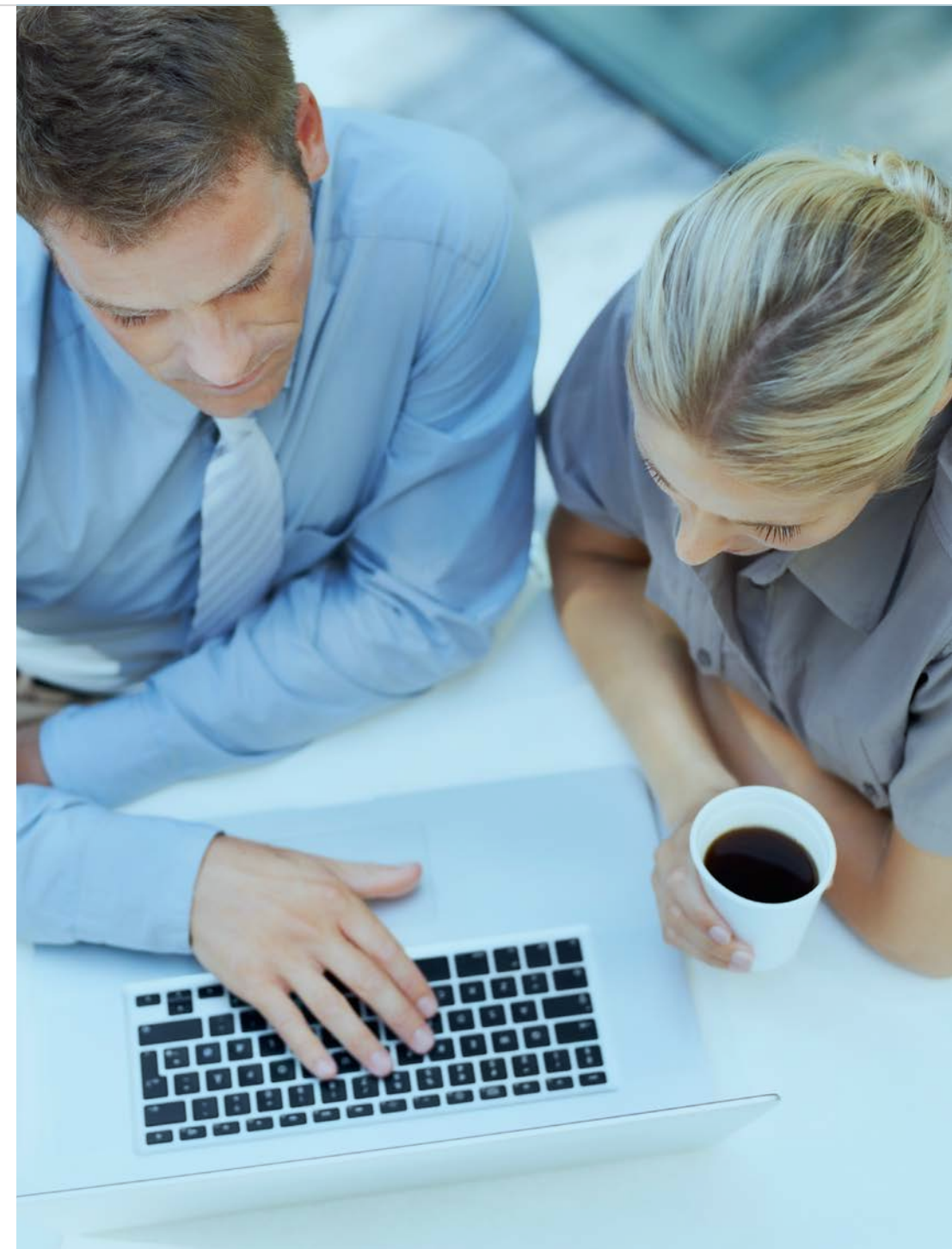


TOP 5 QUESTIONS TO ASK WHEN SELECTING A REMOTE EXPERT SOLUTION

There are different vendors out there with remote expert solutions. Not all of them are built the same way, and not all of them will be the right fit for you. Ask vendors these five questions to help you make an informed decision before deciding on which solution to use.

It is important to think about who you will need in your organization for a successful deployment. This includes the IT team, full Executive sponsorship, and the team who will benefit from this solution.

Use this worksheet to help you formulate a plan when assessing vendors.





1. MOVING BEYOND PILOT - WILL INFORMATION TECHNOLOGY (IT) LET ME DEPLOY?

In many organizations, IT is a critical player in adopting new technology. Working with a vendor that has extensive IT experience will help push the project forward.

▼ QUESTIONS IT COULD ASK:

- Can we control behavior on our network and limit data consumption?
- Can we deploy without extensive firewall changes?
- Can we enforce privacy restrictions to protect IP and employees?

2. WILL TOP MANAGEMENT (CEO, CFO, CIO, ETC.) SUPPORT A DEPLOYMENT AT SCALE?

Deployment of a remote expert solution must align with top management priorities and deliver on the business case.

▼ QUESTIONS TOP MANAGEMENT COULD ASK:

- Does the license model support large-scale deployments and track usage?
- Can we deploy on current hardware and infrastructure?
- Can this solution adapt to new technology such as smartglasses and other enterprise wearables?



3. DOES MY VENDOR PROVIDE A COMPREHENSIVE TRAINING PROGRAM FOR SUCCESSFUL ADOPTION?

Successful deployment and adoption are critical to achieve outcomes including higher asset uptime, faster issue resolution, and increased customer satisfaction.

▼ QUESTIONS TO ASK MY VENDOR:

- Do you have a structured training, deployment and adoption program?
- Do you have self-guided training materials online?
- Do you assist with usage analysis and adoption strategies?

4. WILL THE SOLUTION ADAPT TO MY ORGANIZATION'S CURRENT WORKFLOW?

With any disruptive technology, it is important to understand how the new capability will optimize your current workflow.

▼ QUESTIONS TO ASK MY VENDOR:

- Can I preserve or enhance proven workflows with this new technology?
- Can the remote mentoring tool automatically create and upload new content into knowledge systems?
- Can we attach external video sources as borescopes and ultrasound devices?



5. WILL I BE ABLE TO COLLABORATE FROM EVEN MY MOST DIFFICULT ENVIRONMENTS?

For organizations with global operations, it is important that the solution works in even the most difficult environments.

▼ IMPORTANT QUESTIONS TO ASK MY VENDOR:

- Can I collaborate effectively in extremely low bandwidth situations?
- Can I use the solution in IP-sensitive environments?
- Can I store my sessions and share or view them later?

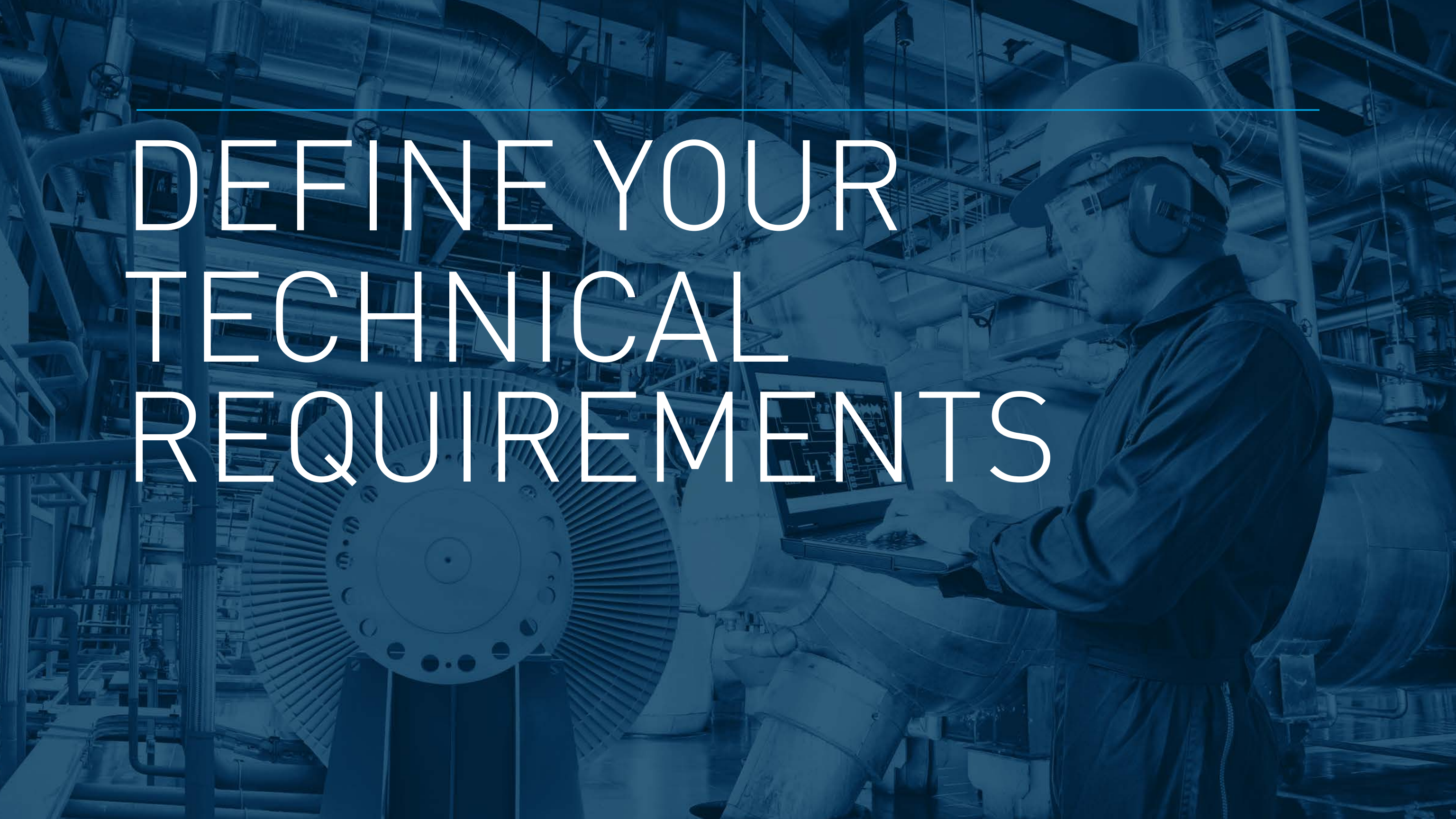
6. PREPARE YOUR OWN QUESTIONS.

Use the space below to create your own questions. There may be specific questions related to the vendors ability to preform.

▼ THESE QUESTIONS COULD INCLUDE:

- How long has the vendor been in business?
- Do they have customers in full deployment?
- Can they connect you with customers for reference?
- Does the vendor have credible partners to help with specialized deployment?

DEFINE YOUR TECHNICAL REQUIREMENTS



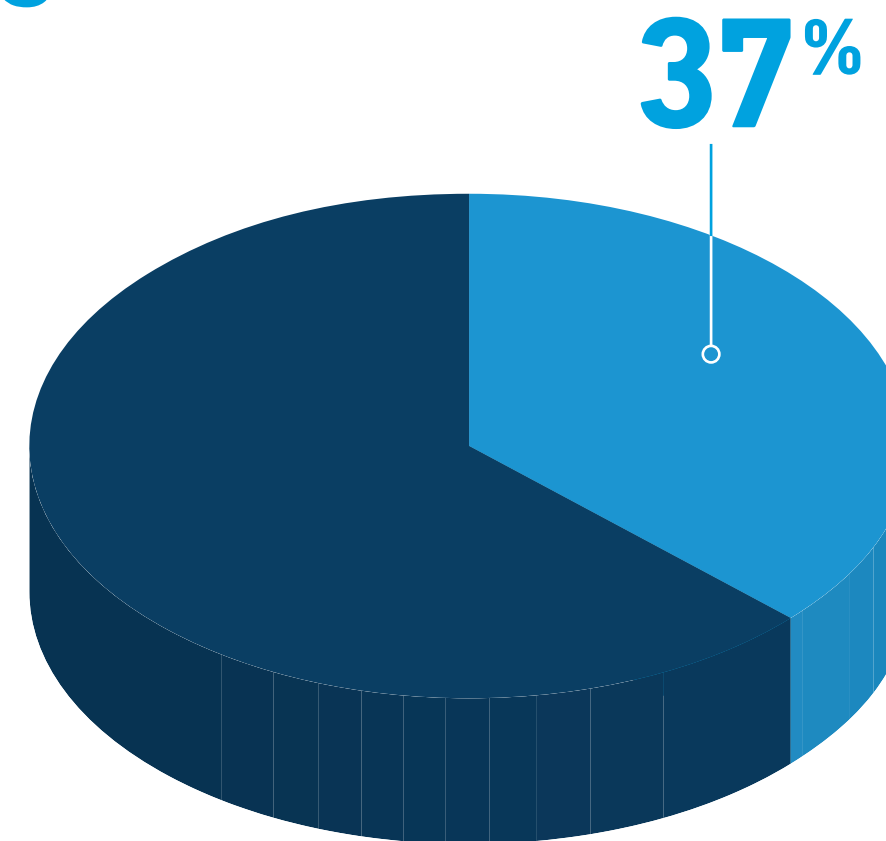


DEFINE YOUR TECHNICAL REQUIREMENTS

Digital transformation has changed the role of Information Technology (IT) within an organization. IT is critical player in long term strategic planning stages as they ensure projects align with current and future digital infrastructure.

It is important to bring in the IT and security teams early during the selection process to ensure approval.

The worksheet below includes key areas and sample IT and security questions to ask your vendor. The worksheet includes room for you to add questions that are unique to your specific organization. Your vendor should be able to work with you and your IT department to answer these questions to build a successful pilot and deployment plan.



37% Of Firms CIOs Lead The Transformation.

Schadler, Ted. "The Sorry State Of Digital Transformation In 2018." Forrester Research Inc., 2018, <https://go.forrester.com/blogs/the-sorry-state-of-digital-transformation-in-2018/>

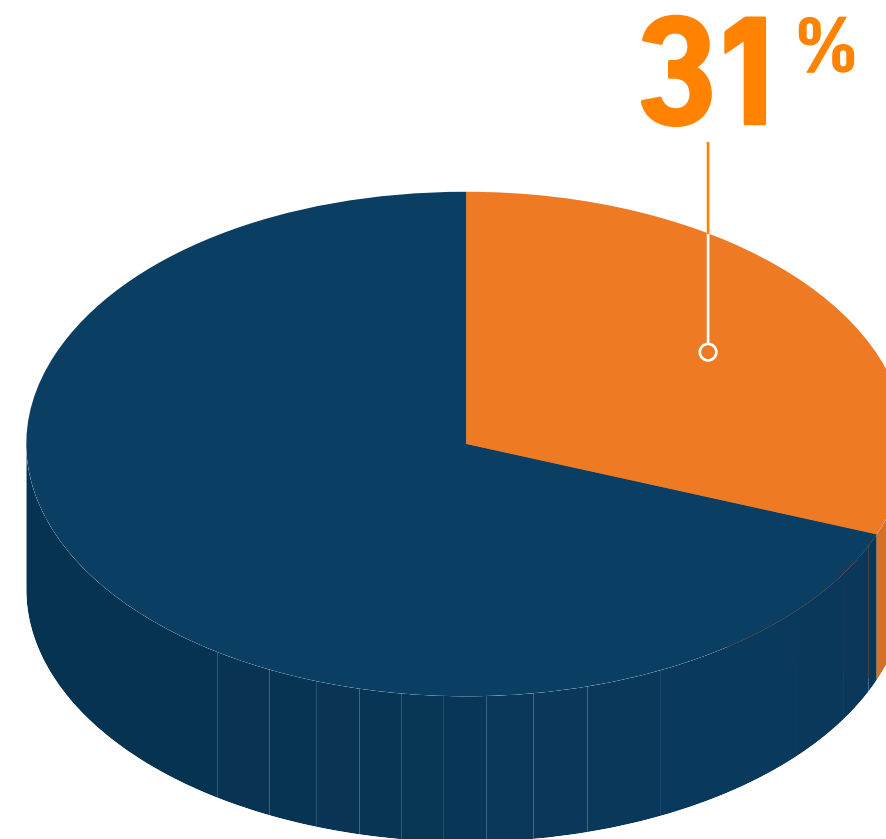


DATA SECURITY & PRIVACY

The following questions can help you understand how data must be treated and secured.

QUESTIONS TO ASK YOUR VENDOR:

1. How do you meet our internal compliance requirements such as privacy?
2. Do you perform external security / vulnerability scans?
3. How often do you backup & how secure are these backups?
4. Do we have an option to deploy the solution on premise (versus hosted)?



In a recent study by Forrester, 31% of global organizations see security as one of the biggest challenges to their digital transformation strategies.

Forrester. "Global Business Technographics® Business And Technology Services Survey, 2017." Forrester Research Inc., 2017, <https://www.forrester.com/Global+Business+Technographics+Business+And+Technology+Services+Survey+2017/-/E-sus3951>

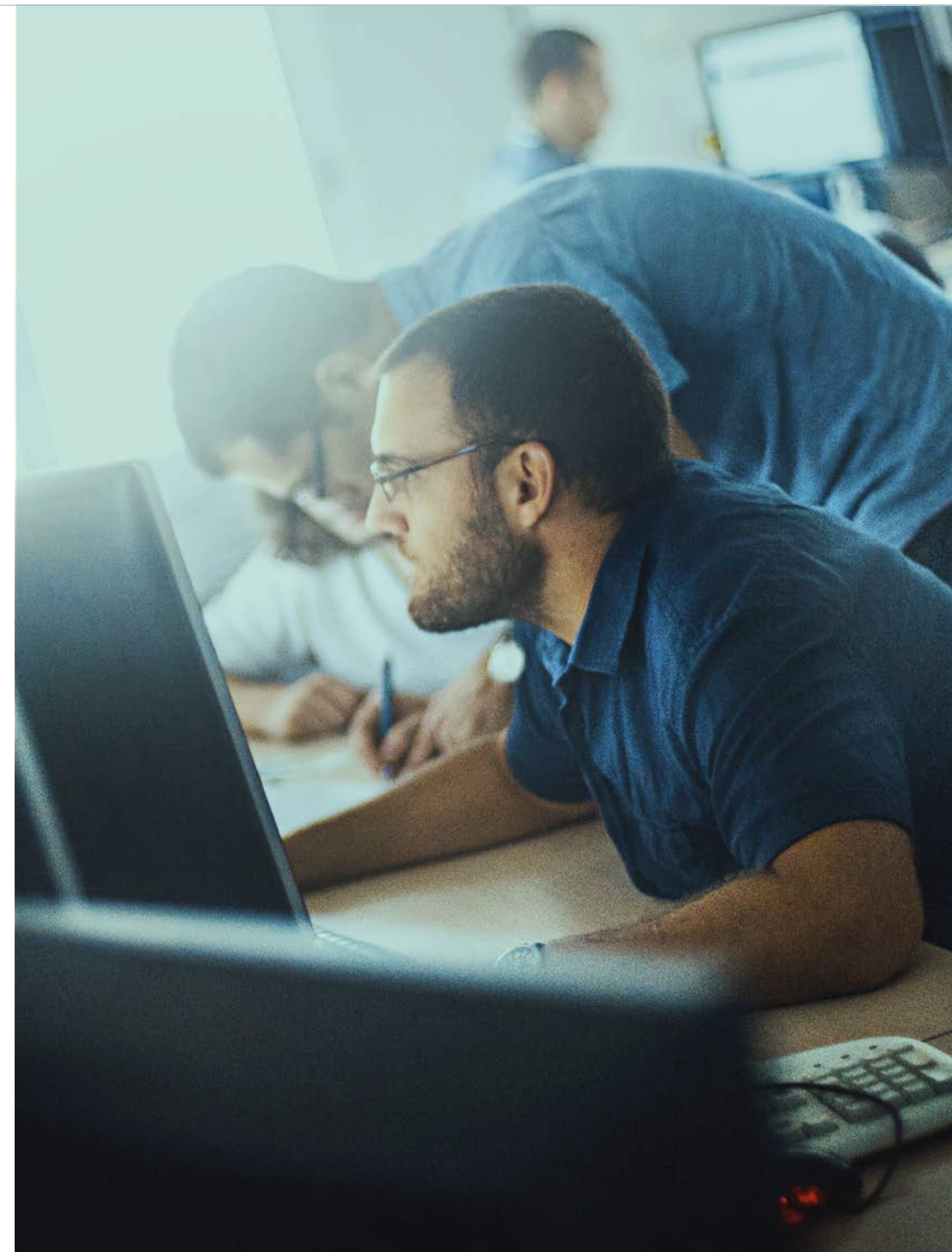


IT STAFF RESOURCES

One often overlooked element is the investment of time needed by different groups within an organization. It is important to consider how much time IT needs to spend throughout the various phases of new technology life cycle for long term success.

QUESTIONS TO ASK YOUR VENDOR:

1. How much time does IT need to invest in a technical evaluation, initial implementation, and ongoing support?
2. What kind of training and support does the vendor offer to IT?
3. What kinds of centralized tools are available to simplify management?





INFRASTRUCTURE RESOURCES

Another resource to consider includes any additional technology investments required to support the solution.

QUESTIONS TO ASK YOUR VENDOR:

1. What hardware upgrades / acquisition (smartphones, wearables, computers) are potentially needed?
2. What software updates are potentially needed? (For example, do we all need to have the latest smartphone iOS?)
3. What network infrastructure upgrades (if any) are required for the solution?





NETWORK MANAGEMENT

Understanding how IT can control the network demands of the technology helps determine the impact on existing network capacity. Selecting a solution that provides IT with good control and audit capabilities helps IT fit the solution into existing capacity.

QUESTIONS TO ASK YOUR VENDOR:

1. Can we create and change default network settings for different groups or users?
2. Can we control the amount of network resources the solution uses during the call?
3. Are there any latency concerns we should be aware of?





ECOSYSTEM SUPPORT

Every organization has an ecosystem of tools and solutions. It is important for IT to understand how this solution will fit into the current and future infrastructure plan.

QUESTIONS TO ASK YOUR VENDOR:

1. How does the solution work within the current ecosystem of other technologies in the organization?
2. Does the solution support industry standards to simplify integration (e.g. SIP call infrastructure, Single Sign on (SSO), etc.)?
3. Can the solution work with our existing firewall / configuration rules?





REPORTING

Reporting brings relevant data to your team so they can understand system performance and demands, help manage user adoption, and optimize license deployment.

QUESTIONS TO ASK YOUR VENDOR:

1. Is there a dashboard showing real time activity including user status, active calls and more?
2. Can we run activity reports based on different user groups and timelines?
3. Can we access troubleshooting logs and network activity reports?






OTHER IMPORTANT CONSIDERATIONS

Other considerations include the ability to get the technology in the hands of your team prior to deployment to identify best practices for deployment. It is also important to identify how the product release cycle may impact the IT group and how support and training resources can assist.

QUESTIONS TO ASK YOUR VENDOR:

1. Can you provide a short-term technical evaluation?
2. Can you share your product release cycle - major and minor updates?
3. What kind of training and technical support do you provide, e.g. online materials, phone support, refresher training with new releases?

TIP: Some organizations including the defence industry have even more requirements to consider such as additional data security methods.



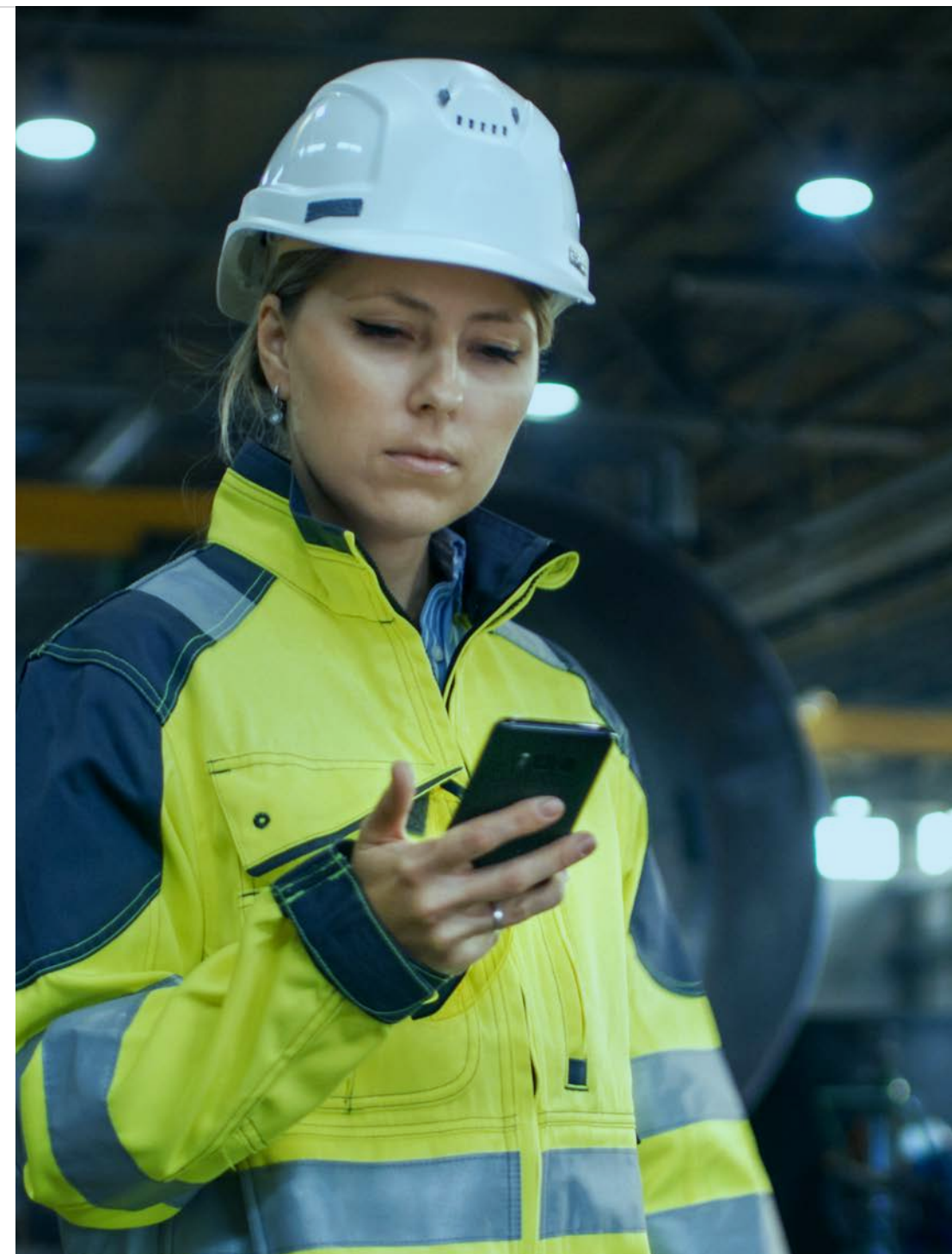
PRODUCT CAPABILITIES



PRODUCT CAPABILITIES

You will notice that not every vendor offers the same capabilities. Certain vendors will be stronger at some capabilities than others. It is important that you understand your use case and needs before assessing vendors.

See the “Build a Business Case” section if you haven’t completed the needs analysis exercise yet.





Use the following worksheet to evaluate multiple vendors (continued on the next page).

| Remote Expert Capability | VENDOR 1 | VENDOR 2 | VENDOR 3 |
|---|----------|----------|----------|
| INTEGRATED SOLUTION: Provides multiple capabilities within an integrated solution such as remote expert, digital work instructions, and knowledge management. Integrates with other internal systems such as the existing CRM. | | | |
| BROAD DEVICE SUPPORT: Runs on enterprise wearables, smartphones, tablets, and computers. Integrates with specialized tools such as test instruments. | | | |
| ENTERPRISE-GRADE SECURITY: Provides multiple levels of security to control access including SSO support, encrypts content and calls. Vendor can provide security assurances such as proof of ongoing vulnerability scans. | | | |
| CENTRALIZED IT CONTROLS: Allows IT to restrict wireless network demands and cellular data consumption with bandwidth controls, enforce privacy settings, and monitor network usage. | | | |
| LOW BANDWIDTH OPTIMIZED: Shares live audio, video and high res images in even the most extreme low bandwidth environments with features such as bandwidth adaptive streaming to manage variability in cellular networks. | | | |



| Remote Expert Capability | VENDOR 1 | VENDOR 2 | VENDOR 3 |
|---|----------|----------|----------|
| SIMPLIFIED OPERATION IN THE FIELD: Includes remote control capabilities for remote experts to adjust the lighting, zoom or take pictures using the field camera. Provides a simplified user interface for the field vs. the remote expert. | | | |
| AUGMENTED CONTENT SHARING: Augments sessions by sharing high resolution images, on screen telestration and text overlays, video recordings, and snips of manuals or schematics. | | | |
| CALL CONTINUITY: Provides a seamless customer experience by escalating support calls into remote expert sessions. Maintains the original audio call and overlays video. | | | |
| ONE-TO-MANY SESSIONS: Brings in multiple participants to collaborate across internal teams or with external suppliers and customers. Includes a simple method to invite external guest participants. | | | |
| KNOWLEDGE BASE ASSET CREATION: Create, tag, store, edit and find remote expert session assets such as recordings and images for future use. Automate the upload of this content and integrate with existing storage systems. | | | |

PLAN FOR SUCCESS





PLAN FOR SUCCESS: TRAINING AND MORE

When it comes to integrating any new technology such as a remote expert solution, it is vital to include a deployment plan that goes well beyond the initial training sessions.

A company should not assume everyone understands why, when and how to use this new technology. If there is no clear plan, chances are the adoption of the technology will fall flat. Here are four key steps to help set up your deployment plan for success.

STEP 1 BUILD A TEAM



Build a robust team that includes leaders and members who have the power to effectively lead change. The most successful deployments have strong top down and champion support.

STEP 2 CREATE A VISION



Develop a vision where all users work in unity toward the same goal of enterprise-wide deployment. It is helpful to associate performance incentives for individuals and teams on the use of this new capability.



PLAN FOR SUCCESS: TRAINING AND MORE

When considering vendors, it is important to understand what type of support and resources you may need as well as the additional services the vendor provides such as these four deployment steps. Find out if the vendor includes an educational service that delivers training, deployment and adoption support.

STEP 3 COMMUNICATE USE CASES



Communicate why, how and when users should use the remote expert capability throughout the entire deployment. Many organizations share success stories within internal newsletters and externally to educate customers.

STEP 4 DEVELOP A TRAINING PLAN



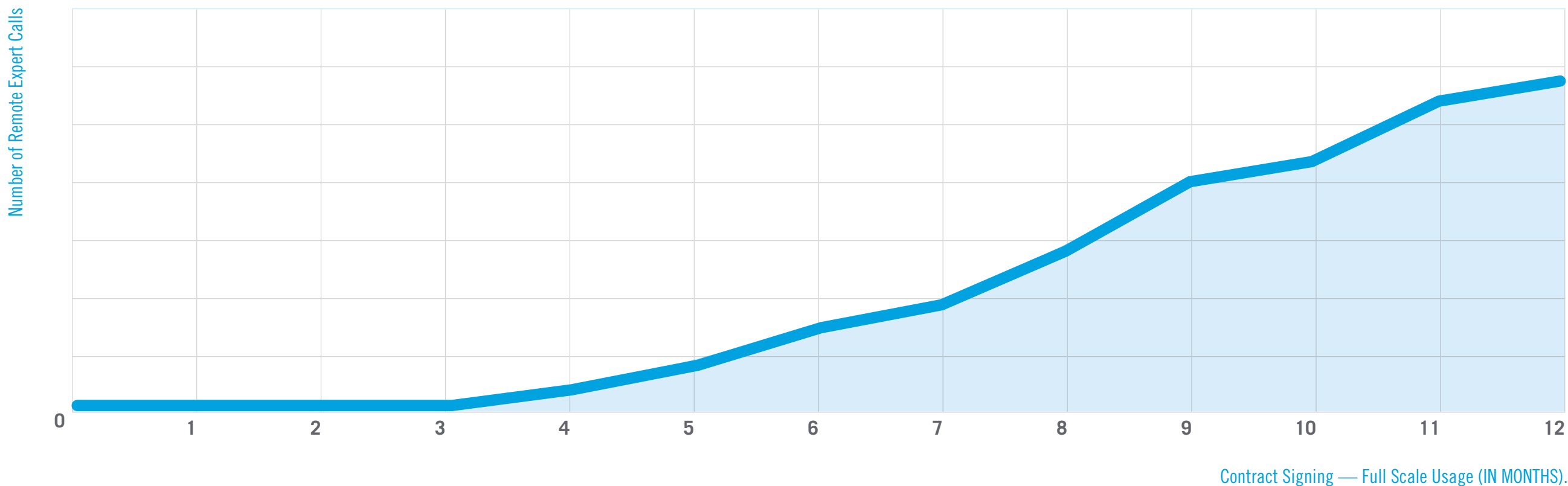
Customize the training sessions around the identified use cases and actively facilitate the training jointly with the vendor. Identifying Super Users to mentor their team members on using the software after training is essential for success.



DATA ANALYTICS

Ensure the vendor has a Customer Success Manager who will work with you to analyze your data and determine if deployment gaps need to be filled. The system must be able to provide you with usage data to assist with adoption plans.

CHART: NUMBER OF REMOTE EXPERT SESSIONS WITHIN THE FIRST YEAR OF PURCHASE



FUTURE



- Administration
- Human Resources
- Legal
- Accounting
- Finance
- Marketing
- Publicity
- Production
- Research
- Business
- Development
- Engineering
- Manufacturing
- Planning



FUTURE

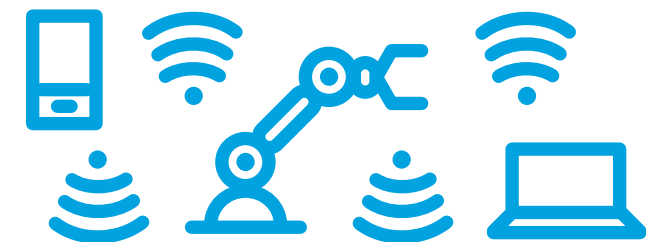
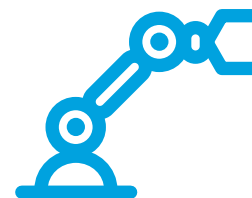
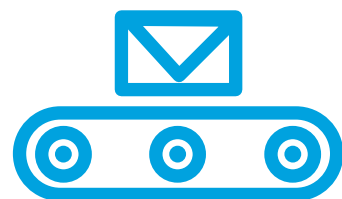
Digital transformation is a continuous evolution of technology, ideas, and innovation. The Internet of Things (IoT), Big Data, Augmented and Virtual Reality (AR/VR), Artificial Intelligence (AI), and predictive analytics create opportunities for enterprises to reshape how they operate.

At the core of all these technology advancements are people. Remote expert solutions bridge across people, process, and things to create value as a core part of the digital ecosystem.

DATA IS THE NEW CURRENCY

Information is the most valuable asset organizations have. Digitizing and tagging data your workers collect daily is important – whether it is a picture of an asset, the reading on a gauge, or a recording of an inspection.

With this additional information, you leverage more data that can expand predictive analytics and improve outcomes.



INDUSTRY 1.0
18TH CENTURY

INDUSTRY 2.0
19TH CENTURY

INDUSTRY 3.0
MID 20TH CENTURY

INDUSTRY 4.0
TODAY

ABOUT LIBRESTREAM





ABOUT LIBRESTREAM

Librestream develops digital transformation technology that improves service operations within the industrial sector.

THE ONSIGHT AUGMENTED REALITY SERVICE PLATFORM:

Deployed globally, the Onsite augmented reality service platform empowers workers to rapidly diagnose, inspect, and manage assets in even the most difficult field environments. The Onsite platform includes the remote expert AR application Onsite Connect, along with industrial digital work instructions, a rich content repository, and optional inspection accessories.

Every 15 seconds, an Onsite Connect call happens in the world.





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PROJECT CHECKLIST

USE THE FOLLOWING CHECKLIST TO HELP YOU GATHER ALL THE INFORMATION YOU NEED BEFORE MOVING FORWARD WITH A REMOTE EXPERT SOLUTION:

- | | |
|---|---|
| <input type="checkbox"/> Define your Need - Does your organization need a remote expert solution? | <input type="checkbox"/> Determine who you need buy in from to move the project forward (IT, CFO, Manufacturing, etc.). |
| <input type="checkbox"/> Build your business case. | <input type="checkbox"/> Define your organization's technical requirements. |
| <input type="checkbox"/> Determine the right ROI / business outcomes for the initial phase. | <input type="checkbox"/> Define what capabilities your vendors should have. |
| <input type="checkbox"/> Define your use case(s). | |

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