

5 Steps to a Better Service Desk

THE CHALLENGE

Service desks: We love them when they help us. And we love to complain about them when they don't: "Too slow to answer." "Too slow to fix my problem." "Not personable enough." "Not knowledgeable enough." The truth is, whether we're internal or external customers, we have high expectations of service desk personnel.

We are often already frustrated (if not totally exasperated) when initiating contact. We have been forced to seek answers or problem resolution and we want our request handled as quickly as possible—a reflection of having become a real-time society with real-time expectations.

All a service desk really needs to do is communicate effectively and expedite the resolution of problems to meet customer expectations. It sounds easy, but it requires a custom blend of people, processes, information, and technology working together to create a service desk that enhances productivity and customer service. Whether you're currently facing service desk challenges or preparing to create a service desk, this article focuses on five key areas that cannot only improve service desk operations, but also get you started on the right path.

1. Create a Circle of Success: Expectations, Metrics, Assessment, Improvement

According to a recent survey conducted by Forrester Research, 41 percent of the more than 2,000 service desk users they interviewed were "on the fence" about their satisfaction. They cited several areas in need of improvement, such as time to resolve requests, timeliness of status updates, and even expertise. Creating a circle of success is the key to addressing these critical concerns among help desk users.

Managing Expectations

Before discussing service desk standards and measurements against which to measure performance, consider the expectations of customers (internal and external) who are served by it. Operational Level Agreements and Service Level Agreements take an extraordinary amount of effort to create and review annually. Therefore, I recommend leveraging your service management system for information to help service desk personnel manage each contact's expected outcome—what I call Service Level Expectations.

Your system should have the ability to track the time spent resolving each type of incident. Service desk personnel can then access this information quickly to tell users/customers what to expect based on historical experience, not fanciful guesses. For instance, "90 percent of these issues are resolved within three days."

As far as expected coverage, the eight-hour, five-day work week is long gone. Business is transacted 24x7. Asking your users about their current expectations via formal surveys is the best way to start the improvement process. If your service desk is new, survey your users about their off-hour needs. If you've had a service desk in place for a while, a survey is more accurate than relying on call logs—users may not be calling, because they are not expecting anyone to answer.

Regardless of the support model chosen to cover off-hours, users and customers must have the resources required for business continuity. The processes and procedures for receiving off-hours support should be available on-demand by telephone at the very least. A best practice is a message outlining the process to be followed on the main service desk line—rather than an online directory of services—since the user's issue may prevent them from accessing anything online.

What do customers want?

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Negative Perceptions? *How do we avoid looking bad?*

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Positive Perceptions? *How do we improve?*

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Searching for Satisfaction

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But what is service desk satisfaction? How do you define and measure success? By establishing metrics. These metrics will provide an assessment of how well your service desk is meeting customer expectations and will also help you monitor improvement progress.

Pulse on Patterns

If your service desk is new or in the planning stage, plan to measure early and often—weekly—to help you identify kinks that can be resolved quickly to protect your service desk's reputation. If you already have a service desk, conduct a baseline assessment against which you can measure progress.

In either case, as you interpret results, look for patterns of problems that need solving rather than one-off "glitches." Take a lesson from low-budget Internet service providers (ISPs) that operate with a very small staff of five or less people. When a problem occurs, they try to find a pattern so that the problem can be resolved for good. Consider making your service desk staff the first line of resolution before embarking on an improvement project. Empower your subject matter experts to help determine if the issue requires a technical fix or can be worked around using a new process, and the ramifications of each alternative.

State of the Service Desk

A simple survey will provide you with the information you need to identify service patterns. The following few questions make it easy for users to complete the survey after each contact.

On a scale of 1-5, how would you describe your level of satisfaction with your recent service desk experience in the following areas?

- Service desk's ability to resolve your request successfully the first time around
- Service desk's ability to resolve your requests in a timely manner
- Expertise of service desk staff
- Availability of service desk staff—in particular, your ability to reach them in a timely manner
- Courtesy of service desk personnel

How does this experience compare to past experiences?

- Somewhat better
- Much better
- Same
- A little worse
- Much worse

Focus on Continuous Improvement

When patterns surface—through survey results, complaints, or service desk personnel—it's time to kick into improvement mode. That means amending staffing (training/coaching/replacement), process (create a workaround or a new process for performing a specific function), technology (develop a fix), or a blend of these areas. What's important to keep in mind with respect to continuous improvement is that after the change is implemented, metrics must be monitored for signals that the change resolved the issue.

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2. Follow Proven Leaders: Best Practices, Technology

At the top of the list when it comes to valuable resources are best practices, which can help identify areas for potential improvement that will enhance the value of the service desk in the eyes of its customers. Assess your current practices against best practices used in other organizations of similar size and industry. Where do you compare favorably and where do you fall short? If you want to lead your peers, determine how you compare to them today, then measure your annual progress.

If your service desk is in the planning phase, consider purchasing and using off-the-shelf software. Successful software is modeled on best practices and designed to deliver tremendous value, functionality, and ROI when implemented straight out-of-the-box. And like best practices, proven software saves you the pain, cost, and time of reinventing the wheel. Before you dismiss this route because you think your service desk is unequivocally unique—are you anticipating or inventing problems that don't exist today and are not likely to occur? Software that meets the majority of your needs could save your organization millions. Rare and special situations can often be worked around or addressed with software customizations.

When scouting for software, leverage your service desk professionals' membership in associations. Their networks of colleagues will help you identify packages that have been used elsewhere with great success.

An aside about working with software vendors: reputable vendors want to make their customers successful. And being a good customer has its rewards. I was involved with a Fortune 500 company that reviewed the offerings of several vendors, quickly chose and implemented the software, and provided the vendor with useful feedback. As a result, the company was selected to participate in the vendor's software improvement process and received preferential treatment.

Depending on the complexity of your project, you might consider working with a systems integrator. The more complex the project and the more far-reaching its impact, the more important this decision becomes—when a service desk interacts with CRM systems, call center technologies, and broad business processes, integration expertise becomes critical. Again, do your homework.

3. Shorten, Reduce, and Simplify Improvement Projects

As customer satisfaction surveys or fielded complaints illuminate specific deficiencies, bridge those gaps with improvement projects. Here are some thoughts on how to structure agile projects. Taking several small steps forward, rather than attempting giant leaps, will protect your service desk from "biting off more than it can chew." Shorter projects, smaller teams, and simpler solutions are better.

Long Isn't Strong

The most common reason that improvement projects stretch beyond initial time estimates is waiting for the new process to be totally complete before using it. It makes good sense to start testing early, on a limited basis, to find out what works and what doesn't. In an innovative culture, communication sets the stage for an early introduction that will expose problems and mistakes and enable quick corrective action.

It's better to implement half of a solution that solves part of the problem (and yields some benefit) than to wait an inordinate amount of time to solve the entire problem. I want to be clear here that I'm saying "do half-fast," not "do half-assed." However—never sacrifice the required design for rushed design in the hope of shaving time off of an improvement project. If you cut development time in half, make sure it doesn't cost more in post-implementation resources.

I am suggesting that project teams stop themselves from creating a roadblock that's not truly there. Think about solving the pattern, not the exception. In many cases, the second half of

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a solution covers the theoretical “what-ifs.” Don’t ignore the what-if part of the solution, but recognize that you may need to form a different project team. Perhaps your service desk staff can create a work-around.

Lengthy projects, especially those with no firm timeline, are subject to derailment. Enthusiastic team members—or worse, project owners—may be reassigned during the project. Commitment deteriorates along with team morale, and the project languishes. I’ve also seen bigger and supposedly more important projects come along and bump projects. One to two months is short enough to maintain interest yet long enough to yield a specific result for a project with a narrow, well-defined scope. It’s also easier for users to absorb change in measured doses than all at once. Finally, seemingly endless projects are also at the mercy of budget fluctuations. Economic adversity can turn off a project as budgets require tightening. That’s why it is important that the project also be defined in terms of incremental pay-offs.

Less is More

Smaller project teams with capable people are more efficient than twenty-person teams. Three seems to be an optimal number, enabling decisions to be made quickly and easily. I have found that larger teams create too many interdependencies, i.e., “I can’t do this until he does that and she does the other.” I’ve heard this referred to as the “deadly embrace.” Essentially, it’s easier to get lost in the shuffle, impairing accountability.

Reliance on smaller teams makes it imperative to select the right people—both as individuals and as a combination. Together, they should embody budget, authority, knowledge, and ability. Individually, everyone wants “good” people on their project, so make sure that candidates have limited involvement in other projects. A person engaged in too many projects is distracted from finishing any of them. And don’t forget to include an effective executive sponsor who has sufficient clout to make any business process or organizational changes the program requires and gain the support of fellow company leaders.

4. Create an Innovative Culture: Communication and Staffing

Let’s face it—not all ideas or projects succeed. Suggestions that don’t work out as well as planned should be treated as opportunities for learning and growth in order to foster future innovations. I’m not advocating a complete disregard for accountability. But if the culture promotes assigning blame and penalizing individuals or groups for open thinking and communication, people will not feel free to exchange ideas and get creative about improvement.

One of the clearest indicators of success is a high level of enthusiasm about a project—within the service desk team, throughout the company, and across the external user audience. Before and during a project, promote the benefits that will impact internal and external customers. Provide updates through a regular report or newsletter to rally the troops.

Communication that flows freely among service desk employees, users, and management is a key feature of a progressive climate. Therefore, the improvement process should emphasize the importance of sharing information, allowing sufficient time for communicating throughout the entire process about the impact of the improvement, and the status of the project.

Hiring, Training, and Retaining

Your service desk staff is obviously an extremely important part of the culture equation, so hiring the right agents for the job is essential. When assessing candidates, remember: agents can be trained to acquire subject matter expertise, but a pleasant, helpful, and communicative personality is more difficult, if not impossible, to acquire. If you’re starting to staff a new service desk, plan how you will hire, train, and manage your team to build the optimal service desk organization. Find proven assessments to determine communication skills and personality traits that match the requirements of the position as well as your culture. Don’t rely strictly on

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Besides on-the-job training, consider formalized, ongoing staff development to improve both technical and business prowess.

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Good luck!

interviews, where candidates exercise the utmost control and strive to show their best side. If you already have a service desk staff, use assessments to determine weak spots that require additional coaching or training.

In addition to the knowledge and communication skills required to perform, the ability to handle stressful situations and irate callers is a must. Behavioral analysis shows that people generally look to past experiences to guide their behavior in a given circumstance. Therefore, avoid interview questions such as, "What would you do in this situation?" which will likely elicit the right answer. Instead, have candidates describe a difficult situation with a specific set of circumstances, and then ask, "What did you do in that situation?"

Besides on-the-job training, consider formalized, ongoing staff development to improve both technical and business prowess. Industry organizations, including HDI®, offer seminars, accreditation programs, and videos to supplement your training effort. A word of caution as you budget for training: Industry surveys confirm that few organizations retain or use their full allocations for training over the course of a budget year. Managers often feel that it's easier to justify canceling or deferring a training session that removes one or more of the staff from the call queue than it is to face potential short-term service issues. However, altering the training schedule sends a negative message to staff that can erode morale.

Companies pay lip service to the concept of valuing employees as their biggest asset, yet fail to nurture their development. In fact, I came across a study that found companies put more resources into maintaining copiers and printers than the knowledge of their employees. It doesn't surprise me. After all, we measure equipment fatigue, stress, and mean time between failures. I look at training as preventative maintenance, a retooling if you will, to refresh service desk people.

5. Celebrate Success

The project has been completed. The results indicate solid improvement. Don't miss an opportunity to make a tremendous difference in not only future staff performance but also in the user perception of your service desk and more. By recognizing and celebrating your service desk staff's achievements, you are demonstrating the value your company places on its service desk staff. One nice side affect of celebrating success is that it defines the end of a project. It also is a good signal to others that projects do finish in IT.

Feature project results in your newsletter or a special bulletin. Share specific improvements through anecdotes and quantified survey results. Publish interviews with individuals on both sides of the desk. By highlighting positive user comments and feedback, you build credibility. The more positive publicity you generate for your service desk, the more likely you are to get funding for creating additional value.

And by all means, host events in their honor to celebrate milestone achievements. In putting these often faceless people in the limelight, you will promote pride among service desk employees and motivate them to achieve greater success.

Wrapping It Up

Be alert and nimble with respect to improving your service desk. Keep a watchful eye on your metrics and an open ear to customer and staff feedback. When a problem represents a pattern, expedite correction with a deftly chosen project committee that will make decisions and get the job done quickly. Keep customers informed about how you're correcting an issue. And when your metrics indicate improvement, give credit where credit is due—to the project folks and your service desk staff. Be generous with recognition and spare blame when a project doesn't fare well. Try again. That's the circle of service desk success.