Executive Summary

In today’s highly competitive business environment, getting more use of your helpdesk system should be a primary concern for any size IT organization. In this whitepaper we will look at emerging technologies, strategies and powerful new help desk solutions being used by a growing number of companies to reduce costs across the enterprise, help IT align with the larger goals of the company, improve customer satisfaction and deliver measurable competitive advantages.
Introduction

Today’s support environment is demanding, talent is hard to find and retain, and end-users/customers continue to demand answers - faster, better and cheaper. This is taking place while IT’s role is being expanded to be the single point of contact for both IT and non-IT related issues. In addition, the credibility of the IT help desk is based on key metrics that are often affected by lack of adequate resources.

New technologies are emerging that provide innovative ways for businesses to address these issues. Some of the enhanced capabilities of the next generation help desk include dynamic resource allocation and routing incidents and problems to an appropriate team member based on expertise, availability or a combination of both; automatic escalations of incidents or problems based on a combination of categories and time criteria; track of IT asset usage; view inventory levels; and manage the entire asset lifecycle from a single system.

This whitepaper looks at the strategic ways any size organization can utilize new innovations that enable getting more use of their help desk system to reduce costs across the enterprise, help IT align with the larger goals of the company, improve customer satisfaction and deliver measurable competitive advantages.

Use self service to its full capacity

Offering a web self-service option helps reduce costs and workload on service desks by offering direct access to frequently asked questions and simple enquiries about open requests via a self-help web portal. By pre-empting the minor and repetitive queries that arise, call volumes can be significantly reduced and thus leave service staff free to deal with more complex enquiries.

According to statistics from itSMF and HDI, a large proportion of the inbound customer service enquiries to helpdesks are to ask the status of open calls or to request commonly available information. Many of the requests will be well-known by the support team and can be resolved easily by the customers if they are given access to self-help tools. By analyzing the behavior of the customers you can proactively add services and solutions to customers over time.

Customer service demands typically follow the 80/20 rule so when starting to provide self-service look at the areas where you get 80% of the benefits for 20% of the effort. It is important to look at ways that online self-service can help improve the quality of customer service you offer but perhaps more importantly you should see it as a way to reduce the need for a customer enquiry in the first place.

The biggest source of uncomplicated, repeat calls for many service desks are password resets. In fact, according to a recent study by the Service Desk Institute, 30-50% of the calls are password resets for various applications. This represents a significant potential cost saving for many organizations, since end-users could easily reset their own passwords if properly equipped. Take a close look at your current volume of password reset calls in your organization and find out what the numbers are and, aimed with knowing the average “cost per call,” then calculate your potential cost savings. Even if you only are able to handle half of the calls there will most probably be a tremendous cost saving. By deploying one of the many standard password reset solutions through your web portal, the benefits will not only empower customers to resolve these simple requests faster but it is also releasing your staff for other work, lowering total service desk costs and improving your teams productivity.

The Service Catalog is becoming an increasing important medium for IT to provide the right services in the right quantities to meet the business demand. Let the Service Catalog be a main interaction with the end users. It should not only advertise your services but take into account all the IT services provided including on boarding requests, request fulfillments and purchases. A web portal is a very cost-effective way to handle lower priority service requests. Make sure valuable phone support time is used for processing higher priority incidents, and position the web as your preferred channel for handing routine service requests.

Finally, drive the customers to the portal with announcements on new services, outages, information and manuals. To truly realize the cost and productivity benefits, you must make the self-service portal your customer’s first port of call for any information, for example: Change information, New rollouts, Policy changes, Service Level Agreements etc.
Have knowledge management in all areas

Knowledge management should be at the core of all your IT solutions and consist of a centralized knowledge base for all company documents including: contracts, processes, planning information and other important records as well as customer facing articles, FAQs, technical manuals and installation guides. By centrally managing knowledge and knowledge items, you will increase efficiency, mitigate data risk, and facilitate collaboration between all teams within the organization. Define relationships between knowledge and related work items by associating knowledge items with incidents, opportunities, work projects, or corporate information. Published documents can then be associated with different areas of work so that internal teams and external customers can search the knowledge base for self-service content based on their access privileges.

By enabling FAQ’s standardize resolutions to common issues, linking knowledge to external knowledge bases / stores will improve self-service and speed up diagnosis and resolution by IT teams. It is even possible to take it to a whole new level by adding resolved incidents to the knowledge base. All support team need the customer to refer to a user guides, manuals, or other sets of instructions so don’t make things difficult; instead equip customers with access to all current user guides, manuals, and installations/configuration instructions through the knowledgebase.

A common cause of repeat call to the service desk is end users not knowing the terms of their SLAs. Negotiating and documenting Service Level Agreements (SLAs) doesn’t do anyone any good if the contents of those agreements aren’t communicated to all customer end users and the service desk. Customers need to know what to expect, and staff need to know at what level of service to deliver depending on the incident and customer. Provide information when they log a request/incident with the service level, informing them about their SLA. More effective communications of SLA contents, resulting in expectations more accurately set and higher customer satisfaction, with an integrated knowledgebase and document management they will easily be able to search manuals etc for a particular topic, and PDF versions provide them with downloadable copies in case they have misplaced their documentation.

Automate all time consuming tasks

The quickest and most effective way to improve and get the most out of your helpdesk is to automate processes within the service and support tools. Automation allows you to define a set of conditions along with a set of actions that should take place when those conditions match.

Automation should be possible in areas such as logging, routing, escalation, workflows and reporting. By configuring the helpdesk tool you should be able to handle dynamic resource allocation and route incidents and problems to an appropriate team member by expertise, availability or a combination of both.

There will also be support for automatic escalations and thus you will be able to escalate incidents or problems based on a combination of categories, requestor and time criteria. Another area of automation is satisfaction surveys or follow-up emails as a result of logged service desk calls. By building auto responders into the system, your support staff can concentrate on solving tasks, not completing paperwork.

Finally, don’t forget to automate workflows and approval processes such as purchase orders and new hire requests – not only for time saving but also for audit purposes.
Use CTI to get more out of staff and systems

Computer Telephony Integration (CTI) links your computers and telephones to handle all your voice, fax, and data traffic. Linking your service desk system with a CTI integration provides analysts with record pop-up, on-screen telephone interfaces, one-click dialing, and incoming and outgoing call event automation. The result is dramatically reduced operating costs, time spent facilitating tasks and improved quality of the customer service you provide. The benefits in using CTI can be grouped in areas as per below:

- **Improved customer service**
  By receiving customer details on screen at the same moment the incoming call is received enables analysts to give a better, more personalized and immediate response to the customer. The analyst will also be able to instantly see key details about the customer and thus provide a quicker and more effective service.

- **Greater efficiency**
  The logging and recording of calls is faster and more accurate allowing analyst to handle more calls. Research shows that CTI will take at least 30 seconds of an average call and over a for example a 1,000 calls this will save over 5 hours. Another saving is misdialed calls and the cumulative time lost to wrong numbers can be substantial in a large organization.

- **Cost reduction**
  Optimizing voice, fax and data on a network means less phone lines are required which will reduce the cost and it often allows the use of alternative carriers and/or VOIP protocols which reduces the cost further.

Use standards such as ITIL and IEC/ISO20000

Many business executives express frustration as they attempt to control their IT investments but find little in the way of substantive guidance. There are several standards out there to help you not only control your IT investments but also improve and make it both accountable and cost effective. The IT Infrastructure Library (ITIL) is the world’s most widely accepted approach to the management and delivery of IT Services. The top benefits from implementing ITIL are:

- **It provides a single, definable, repeatable, and scalable documented framework for IT best practices that flow across the IT organization and ensures everyone is “talking” the same language as well as providing a framework for IT to support regulatory challenges.**
- **It identifies roles and responsibilities for IT Service Management as well as Improves communication and information flows between IT and organization business departments.**
- **It supports reducing IT costs and justifying the cost of IT quality with ability of IT to measure and improve internal performance, service provisioning and user productivity.**
- **Improves ability of IT to adjust as business opportunities and challenges are presented and improves the relationship of IT with the business.**

ITIL provides guidance on what should be done in order to offer the clients of an IT organization adequate IT Services to support their business needs. ITIL qualifications are available for individuals but until recently there was no way for an IT organization to prove that it is working along the ITIL recommendations. The ISO 20000 standard was conceived to fill this gap. Initiated by the two organizations itSMF and BSI (British Standards Institution), it is modelled upon the principles of ITIL, and offers IT organizations the possibility to become certified. Other standards like IEC/ISO 20000, CoBIT and Sarbanes Oxley builds further on the ITIL framework and provide guidance on audit and accounting within organizations.
Utilize asset management

Software Asset Management (SAM) has grown rapidly the last couple of years, especially with ITIL becoming a vital strategic value for organization to maximize the value from their IT investments. SAM is essentially the processes and procedures that govern the software asset lifecycle from purchase, managing, optimizing, deploying, maintaining and the ultimately disposing of the software applications within an organization. ITIL defines SAM as “…all of the infrastructure and processes necessary for the effective management, control and protection of the software assets throughout all stages of their lifecycle” and ISO 20000 states that good practice in SAM should result in several benefits, and certifiable good practice should allow management and other organizations to place reliance on the adequacy of these processes. The expected benefits should be achieved with a high degree of confidence.

The goals of SAM are to reduce information technology costs and limit business and legal risk related to software assets, while increasing end-user productivity and IT productivity.

What are the benefits with Software Asset Management?

By implementing a Software Asset Management program can reap huge benefits for organizations. Here are some of the benefits:

- Reduce total cost of ownership (TCO) related to IT assets and improved financial control. By managing the full lifecycle of the software assets ensures that all licenses are allocated and there is no over allocation and there will be benefits in taking advantage of volume discount when using a centralized licensing model.
- An obvious benefit from software asset management is License Compliance and the ability to ensure you are fully licensed and compliant at any given time.
- Minimize security risks by preventing the use of unauthorized software and enforcing desktop standards which also eradicates the potential of damages and costs caused by computer viruses.
- By controlling both unauthorized and licensed software and making sure it handled and maintained correctly will reduced IT Support and thus freeing up helpdesk resources.
- The result of a software asset management program will also lead to improved End-User Productivity, by having manuals, support and reference material at hand and deploying the right technology quickly and reliably.

Use metrics and notifications to your advantage

In order for a help desk to be successful it must operate at optimal level and efficiency. It is important to measure performance metrics and take action to maximize first contact resolution, take advantage of knowledge bases and solution databases and most importantly, log all calls.

If an organization fails to log 100% of all incoming service events, vital information about the use of technology effectiveness will be lost. Realistically, every service event not logged did not happen, and if it did not happen, how can it be prevented from happening again?

To get the most out both staff and systems make sure you have correct management information. The service desk system will have a “home page” for announcements, personalized information and ability to display interactive and customizable information for all business processes. Furthermore, the system should also allow for customized reporting, information widgets, the creation of drill-down pivot charts, and operational information graphs.

Alerts should be possible on all types of events and cover several mediums such email, on-screen, dashboards, SMS, pager etc. Color coding to quickly see what is urgent. Escalation alerts and management visibility report.

Make sure to configure your reports to match a balanced score card including all aspects of the business. A balanced score card is divided into four areas; Financial information, Customer metrics, Internal Business Process measurements and Learning and Growth identifications.

Extend mobile technologies

It’s clear that mobility is a game changer. With mobile devices expected to overtake PCs for accessing the Internet by 2013, this new paradigm is already changing the way organizations accommodate how employees work and deliver products and services. The use of smart mobile devices in business today is ubiquitous and continues to grow at the speed of light. Mobilizing your helpdesk for mobile devices can greatly improve productivity, efficiency and customer satisfaction.
ITSM applications are a natural fit with smart mobile devices. Service technicians in the field need to have access to the information found in a production ITSM application. Access to key configuration information and the ability to log an incident and provide sufficient information to begin the service process can be critical. With nearly everyone in business having access to a smart mobile device permits users to freely access the helpdesk with dexterity and ease. For example, users can access self service apps and request a new password remotely quickly and easily without calling the help desk or log an incident immediately from anywhere using an iPad.

Mobile ITSM encompasses more than enabling access to services via smart phones and iPads. The evolution of software development tools have also made it faster and easier for anyone to build mobile applications. Many of these tools don't require the user have any prior programming skills which has given rise to the citizen developer movement. Gartner's definition of a "citizen developer" is anyone operating outside the scope of enterprise IT and its governance that creates a new business application. Gartner argues that end-user created business applications are increasing, with 25 percent of new business applications expected to be built by so-called "citizen developers" by 2014.

With the influx of mobile devices and growing emergence of citizen developers, IT shops that ignore these trends and don't put sound policies and procedures around standards, security, compliance and governance policies in place could face dire consequences as mobile gains momentum.

Be proactive

Today many IT professionals are expected to do more with less. This means there more pressure with less time, more work with fewer staff members, and more control with less tolerance for mistakes. All of these can put the business at risk unless processes, plans and monitoring are put in place to handle potential problems.

The solution to the problem lies in using a proactive management style instead of reactive management. You can use the proactive approach in nearly every area of IT. It is about controlling risks, controlling costs, and eliminating or reducing the effects of problems that do arise.

The proactive approach is to plan for and control situations. Planning involves looking for every potential risk to a system, service or project. By looking for risks before they happen you can use strong problem solving and risk management techniques to create processes and plans to put into place when they occur. When a problem occurs you then have a step-by-step plan for solving it. More importantly with proper monitoring you eliminate the risk before it ever becomes a problem.

Organizations must also train their staff in proactive management. It should be built into the culture of the organization. Processes should be put into place where incident management and problem management will spot trends in incidents and fix them to prevent future incidents. From upper management to the help desk, all staff members must know what their proactive role is.

Measuring customer feedback on an ongoing basis with help desk satisfaction surveys is vital in being proactive versus reactive. With end users' needs constantly changing as technology and business environments evolve, customer surveys provide the benchmarks you need to know what IT users want, how well you are meeting their needs and when you might need to take aggressive action to improve services, systems, and communications.

Proactive management fits well into today's world of doing more with less. Since you have less time, less staff and a lower tolerance for mistakes a proactive approach allows you to put into place solutions to most risks and problems that can arise. By evaluating potential risks, planning for them with step by step processes and monitoring for potential problems you will greatly reduce the potential damage and further risks to the business. There are some interesting development in this area for example looking at authors DeMarco and Lister and their PeopleWare concept.

Finally, one of the eternal frustrations expressed by customers of all Help Desks does not understand end users and the technology they rely upon to do their work. This lack of technical knowledge heightens their anxiety when something goes wrong. Anyone who's taken calls has wished their customers had a bit more understanding of how things worked so the conversations regarding the repairs could be more efficient. Knowledgeable customers are more comfortable with the equipment. Excellent Service Desk support is vital to ensure a company consistently delivers the required IT Service & Support levels. The responsibilities of the analysts are many and they evolve constantly, so a diverse skill-set is required to meet the challenging demands placed on them. Many organizations focus on honing their technical skill but in fact soft skills and troubleshooting skills are far more important for the Service Desk.
Reuse the Technology

Reuse is often described as not "reinventing the wheel" and in order to reuse you will need to understand the options available. You can reuse source code, components, development artifacts, patterns, templates and applications. Looking at Service Desk tools, there are several ways in reusing and extending the tool. The most common areas are to extend the tool to be used for eternal support, facilities management, human resources and recruitment management. Other areas is to use the workflow capacity in service desk tools and configure it to handle internal processes such as purchase order handling, complaints management and internal approval process to mention a few examples.

Summary

This paper discusses the processes and methods organizations can implement to make better use of their helpdesk system to reduce costs across the enterprise, help IT more effectively align with the larger goals of the company, improve customer satisfaction and deliver measureable competitive advantages. From an IT service management perspective, these include:

- Using self service to its full capacity
- The importance of having knowledge management at the core of all IT solutions
- Automating all time consuming tasks
- How CTI integration dramatically reduces operating costs, time spent facilitating tasks and improved quality of the customer service you provide
- Using standards such as ITIL and IEC/ISO20000 to control IT investments
- Asset management’s ability to reduce information technology costs and limit business and legal risk related to software assets Use metrics and notifications to your advantage
- Extending and embracing mobile technologies
- Having a proactive management style versus a reactive management style
- Options for extending and reusing Service Desk technologies

Conclusions

Today’s support environment is demanding. In addition to end-users insisting on answers faster and more efficiently, IT’s role is evolving into the single point of contact for both IT and non-IT related issues, while IT help desk credibility is being based on key metrics that are often affected by lack of adequate resources.

New technologies provide innovative ways for businesses to address these issues. Automating and streamlining IT services and help desk activities with configurable workflow, process management, email notification and knowledge base; along with facilitating self service with a powerful web portal that includes online incident submission, status checks, online conversations and intuitive knowledge base searches; are some of the vital and necessary capabilities required for organizations to get the most out of their helpdesk system. The end results:

- Improved Efficiency: Eliminate confusion, conflict and wasted time while delivering a more effective service
- Increased ROI: Get more return out of staff, training and equipment and better tracking of profitability
- Improved Customer Satisfaction: Meet or exceed customer expectations
- Better Staff Management: Put the right people in the right place at the right time
- Less Stress: Spend less time fighting fires and more time growing the business
About the Author

Rick Jonsson has over 15 years experience in the Service Desk industry and currently works as a Senior Marketing and Business Development Manager for TechExcel, Inc. His industry certifications include ITIL, ISO 20000 and Prince2. These certifications together with hands-on experience implementing effective service desk software systems at some of the largest corporations throughout the world, have given Rick refined expertise in implementing quality measurements and service desk software rollouts, in addition to extensive experience as a training service desk manager. Before joining TechExcel, Rick ran service desks for high-tech companies such as QAS, Trigold, Compaq and Gateway.