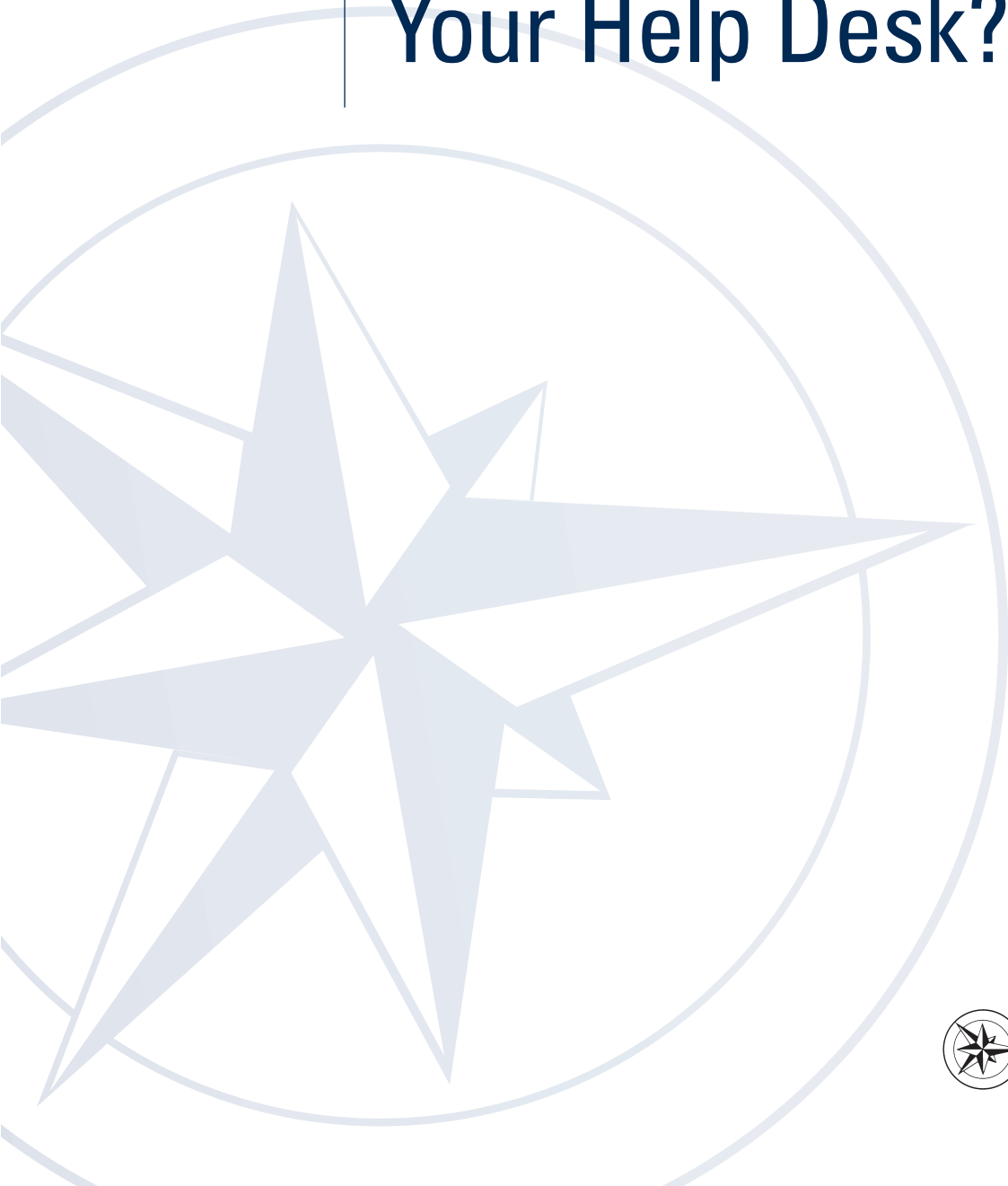


Grow Up

How Mature Is
Your Help Desk?



By Jeanne Cuff

Introduction

Specific behaviors and levels of maturity mark an individual's life stages of childhood, adolescence, and adulthood. And as any parent will tell you, the transition from one stage to the next can leave some damage in its wake.

Organizations can follow a similar dynamic. Consider an IT Help Desk: its responsibilities and skills develop in response to changes in the business environment. But when those changes outpace the Help Desk's maturity level, problems can result both for the IT organization and the business it serves.

Effective managers can ensure that Help Desk capabilities evolve and stay abreast of business requirements. By establishing goals, processes, and measures that align with business needs, management can enhance Help Desk service, retain skills and knowledge, and ease the transition to the next stage of maturity.



Childhood Is So Easy

In many large organizations, IT Help Desks are often first established largely through happenstance. In a site with, say, 300 to 500 users, a few individuals may emerge as problem solvers who users rely on for help with printer issues, applications support, and general IT maintenance. Typically, these trouble-shooters have other jobs that become neglected as word of their technical acumen spreads (“I bet Joe down in Accounting could fix that...”). At some point someone in management — either the individuals managing this unofficial support staff or someone on the IT side — must make a case for a formalized Help Desk, whereby the informal problem-solvers become full-time IT support staff.

At this initial stage of “childhood,” the Help Desk consists of one to three people who identify user problems over the phone and, if necessary, go to users’ desks to solve them. Such a Help Desk can quite adequately serve several hundred users; indeed, it often delivers superlative service, as staffers develop critical knowledge and valuable skills, and become indispensable to the business.

Eventually, however, the workload increases to the point that the skills, energy, and good intentions of the Help Desk staff are no longer enough, and service quality inevitably suffers. “Good ole Joe,” once so quick to solve any user problem, is now frequently away from his desk, and takes longer and longer to respond to requests. The reason: he’s always at someone else’s terminal fixing a problem.

This environment can be characterized as adolescence.



Teenagers Are Expensive

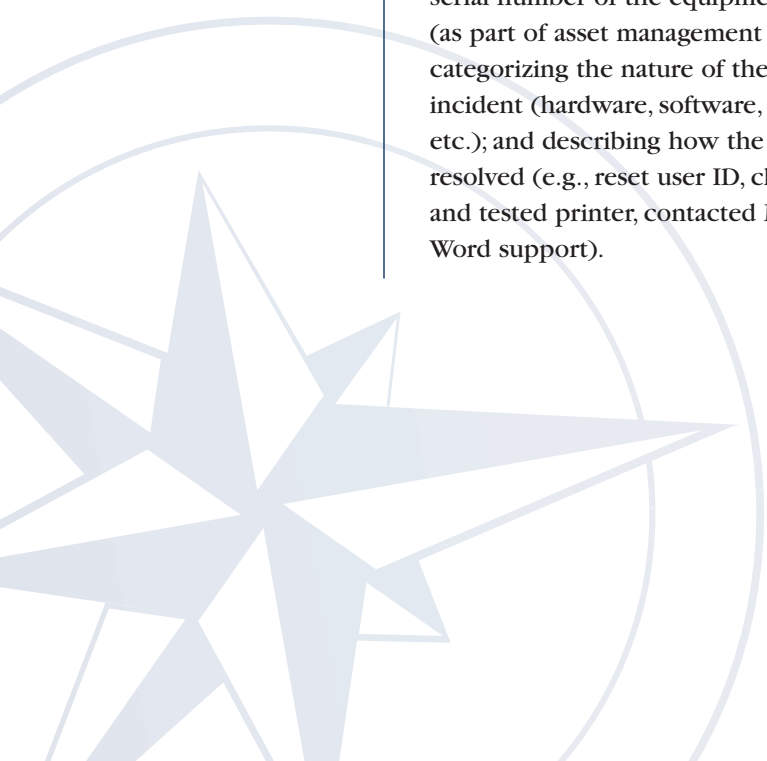
Through their hands-on experience, adolescent Help Desk staffers develop a good intuitive knowledge of the nature of problems and incidents that occur. But since they don't adequately record or categorize call data, they can't really analyze trends or recognize the types of situations likely to occur. The staffers certainly work hard, and they're often exceedingly skilled, but they react to, rather than anticipate, problems. Ultimately, the environment becomes a treadmill.

A reactive Help Desk tends to be expensive. The skills and experience that make Help Desk staff indispensable to the business also make them highly paid. Moreover, the pace and pressure of constantly taking calls and scrambling from one user to the next eventually becomes overwhelming. Burnout leads to high turnover, and all that valuable skill and internalized knowledge of the business walk right out the door.

One key to a manageable adolescence is to track and classify calls. Basic tools and processes can include recording the name of the user, date of the contact, and serial number of the equipment at issue (as part of asset management practices); categorizing the nature of the outage or incident (hardware, software, LAN, voice, etc.); and describing how the issue was resolved (e.g., reset user ID, cleaned and tested printer, contacted Microsoft Word support).

Another key practice in the adolescent stage is a division of labor into first- and second-level support roles. Junior staff are assigned first-level support roles — they handle calls, record data, and categorize incidents. More experienced staff, meanwhile, focus on second-level support — going to users' desks to fix the more vexing problems that can't be addressed over the phone.

Beyond a certain volume, an agent simply can't do an effective job both handling calls and servicing users — you can't be in two places at once, after all. A two-tiered approach therefore provides a much more efficient structure to solve problems. Assigning specialized roles can also establish a career advancement path within the Help Desk and reduce the stress of handling multiple responsibilities. This can increase job satisfaction, enhance skills retention, and improve service quality.



Transition to Adulthood

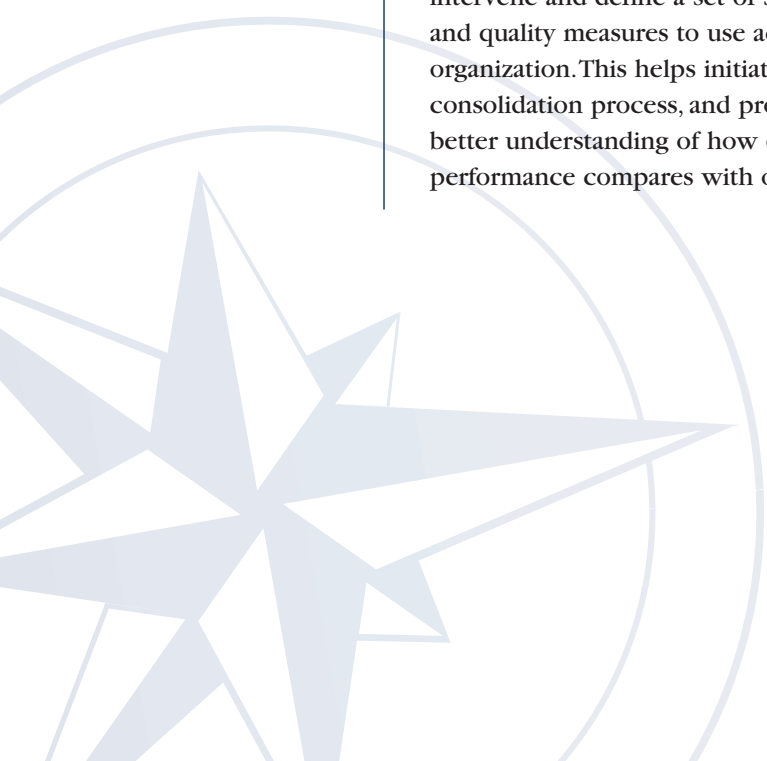
The acquisition of additional divisions and business units can impose adult responsibilities on the adolescent Help Desk. Suddenly the 400 to 500 users in one location become 3,000 users in six locations. Each location has its own adolescent Help Desk, with its own set of collection tools and criteria, call categories, and distribution procedures. Since some adolescents are more mature than others, a few Help Desks will function efficiently, with staff specializing in first- or second-level support, while others will have high costs and low quality service, with personnel both handling calls and resolving problems.

At some point, either dissatisfied users or corporate financial management will demand that the Help Desk organization “grow up” and improve service and reduce costs through centralization and consolidation. Such initiatives will likely meet with bitter resistance, as they threaten the fiefdoms of the individual Help Desks within the organization, each of which is convinced that its processes and services are superior.

To break this impasse, management must intervene and define a set of standard cost and quality measures to use across the organization. This helps initiate the consolidation process, and provides a better understanding of how one unit’s performance compares with others.

Common procedures and standard measures allow the centralized Help Desk to identify similarities and document differences within the organization. This facilitates the process of streamlining through the reduction of redundant or sub-optimal business applications. For example, if one site uses an asset management tool ideally suited to the company’s financial tracking needs, the CIO can implement a standardized system and maintain an enterprise license for that particular tool. The other sites can then drop other licenses and asset management procedures.

For a department-specific application, tracking Help Desk calls can enhance productivity by enabling management to identify and correct weaknesses in the application, or, alternatively, to train end users to better utilize the tool.



Adulthood — How Boring

In adulthood, the Help Desk is characterized first and foremost by centralization — customers from all over the country call a single number. Business applications are well documented with specific escalation procedures for unusual issues. Calls are classified into distinct categories — incidents, service calls, and information requests. Monthly reports summarizing activity alert the Help Desk manager of potential problem areas.

A grown-up Help Desk uses call data as a proactive management tool. By analyzing incidents, problems, and resolutions on an ongoing basis, the Help Desk gains insight into what's really going on in an organization, and addresses problems before they become serious. Service Levels are documented and published regularly for end-users. Help Desk staff morale is high and turnover is low, primarily because new agents have an opportunity to advance and develop new skills, and because more experienced agents have a manageable workload and are able to do what they do best — solve problems.



Summary

- A small Help Desk of three to five agents can provide adequate — even excellent — service for an organization of 400 to 500 users.
- At some point, business growth will likely outpace the organizational capabilities of a small Help Desk, resulting in service degradation and high costs.
- Implementing basic data collection processes on call incidents are essential to managing the evolution of the Help Desk through the “adolescent” stage.
- Specifying first- and second-level support roles is another critical characteristic of managing Help Desk growth. This division of labor enhances efficiency, alleviates burnout, and establishes an advancement path for new agents.
- To accommodate significant organizational growth, consolidation of individual Help Desks into a centralized unit is an essential, but difficult, process.
- A fully mature Help Desk analyzes call data to proactively address problems before they become serious. This enhances efficiency and quality of service.

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Help Desk Maturity Checklist

Specific process changes needed in order to move towards a centralized (adult) Help Desk include:

- Establish a single point of contact (an 800 number).
- Each site should have a single ACD with a VRU selection (“for Manufacturing, press 1, for Financial Services, press 2...” etc.).
- Each site should use the same tool (Remedy, Pergrine, or any other Help Desk tool that is appropriate).
- Establish general and standard contact classifications for all sites. Each site should be generating monthly reports listing the volumes by types of contacts:
 - **Incident**
Can be solved by the agent (common office application support questions)
 - **Service Request**
Requires a 2nd level support team (server support and break/fix issues)
 - **Information Request**
General questions or status on current tickets
- Each contact should have additional information regarding the nature of the call, such as:
 - Common Office Application (Incident)
 - Break/Fix (Service Request)
 - Server Issues (Service Request)
 - Business Office Application (Incident or Service Request, depending on documentation available)
- All agents should record all contacts to their individual Help Desks using the same contact classification.
- Identify a single Help Desk manager (preferably a company employee) to develop and enforce call classification and reporting compliance.
- Begin to develop a knowledge management database for all Help Desks within the organization.



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