

Operational Efficiencies: Best Practices for the Help Desk

Organizations today are constantly striving to improve the productivity of their employees and add value to their bottom line. With the technology industry slowing, how can companies optimize their help desk environment without the resources they enjoyed in a more robust economy?

In the help desk or service management environment, best practice means just that: a practice where “best” actually describes the difference between the performance of the exemplary and the performance of inferior services. To create a topnotch customer help desk, companies must consider how to incorporate best practices into their daily operations, to enhance the efficiency of their help desk environment and increase customer service levels. Where should an organization interested in achieving a more efficient help desk begin? How can companies integrate best practice activity into their help desk’s culture and support delivery models?

To do this, a company must observe all angles of its support structure and should implement operational strategies in their environment to enhance user productivity while the help desk contributes to the profitability of their workplace. Operational strategies— whether applied throughout a company or only within its help desk environment—allow an organization to translate its guiding principles into actionable best practice programs and processes. Key strategies that are recognized as enabling best practice activity include:

- Apply business thinking to help desk operations
- Focus on problem elimination
- Establish & maintain a strong service culture
- Value employees as assets to be optimized
- Gather & leverage knowledge
- Anticipate change
- Implement customer self-support options
- Embrace outsourcing as a tool
- Utilize a team approach
- Integrate support-enabling technologies

Apply Business Thinking to Help Desk Operations

A good business partner is able to communicate to customers the value it provides and is willing to be evaluated on its ability to meet or exceed predetermined performance measurements. Forward thinking help desk organizations know they must operate like individual businesses to insure their viability within the corporation. It’s useful to frame this new perspective in the context of the “Critical Cs” that lead to success:

Customers

Every good business is grounded in a thorough understanding of “Who are my customers?” Know who the customers are, understand how they utilize services and anticipate where their needs will change.

Competencies

To be successful an organization must understand what it is that its employees do well as well as what what will users need to know in the future to contribute to the company's success. Where do they need to improve their skills and increase overall productivity? How will they obtain these skills?

Costs

Value is a measure of cost against contribution. In order to establish value, an organization must first understand the cost (both budgeted and hidden) represented to the enterprise. What are the costs to run the support organization? How do these costs compare to other comparable help desks? Where can operating costs be improved? How are they currently recovered?

Competition

Remember that a single-support organization is not the only option to the enterprise. Use this perspective as motivation, and review how competitors operate. What are they doing well, and can anything be learned from their experience and initiatives? How do costs compare?

Channels

There are many ways to deliver service and support: phone, online, self-help, fax, in person, etc. What channels are currently utilized? What other options should be considered? What are the benefits, risks?

Communications

A job well done carries little weight if nobody knows about it. Continue to market the services that the help desk provides and communicate the successes and accomplishments of the help desk to all customer groups.

Change

Customer's needs will change and a flexible support organization must be prepared to change with them. Have a plan to anticipate and manage changes in processes, services and attitudes. Commit to creating the flexibility that is required in today's dynamic business environment.

Focus on Problem Elimination

As technology continues to evolve at a brisk rate, demand for effective end-user support will continue to increase. As companies replace their legacy computing systems and adopt Web-based applications, they also need to abandon their "legacy thinking" about the role of support services. Companies that learn how to use their support operation as a strategic tool for identifying and eliminating fundamental problems will see real advances in productivity improvements, increased customer satisfaction and business success. The rate of technology substitution is now so high, that new incident types will grow fast enough to offset the natural decline of older incident types.

Using techniques such as root cause analysis allows the help desk to be proactive in their effort to eliminate problems, rather than reactively fixing individual support requests. By understanding the root cause of recurring problems, the help desk can contribute to the eventual elimination of common user problems.

Establish and Maintain a Strong Service Culture

A talented workforce is the best insurance for the future; offering employees opportunities for growth and development may be the smartest investment a company can make. If an organization seeks to recruit the best and brightest it needs to remain competitive and must start developing an environment where continued education and change are embraced. Team members should work in a learning environment in which they can gain the most experience and refresh their intellectual capital faster than they could have it refreshed elsewhere.

Help desk management should recruit and retain analysts that exhibit excellent customer service skills. A strong service culture within the help desk will directly contribute to the overall success of the support organization. While technical skills are important, outstanding customer service skills has more impact to user productivity and customer satisfaction.

The skill level, responsiveness and professionalism of the staff are the most visible features of a service organization to its clients. Today's business goals revolve around more performance and greater efficiency. In our rush to re-engineer business processes and apply technology to boost performance and efficiency, we often overlook the potential of our biggest asset —human capital.

Gather & Leverage Knowledge

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? Benefits of logging service events include:

- Enhances the help desk's strategic value within the company; the content of the service management system will be the one reliable source of technology performance information.
- Justifies the staffing levels in the help desk. Being able to understand the type of calls and complexity of the calls will be valuable in the staffing process.
- Validates equipment acquisitions & upgrades for staff.
- Pinpoints system-development weaknesses.
- Detects any training weaknesses.
- Improves future system development through the understanding of vital information on how technology change was accepted last time the organization made similar changes.
- Identifies low value/high volume service events, like password and printer resets, that could be automated. Free-up staff to do things that are more strategically important to the company's success.

Through sound trend analysis practices, critical information is provided on where an organization can concentrate its energy in order to prevent recurring problems having an impact on customer productivity, making it a critical tool for problem management.

Anticipate Change

Participation in the IT organizations change management process is a critical service provided by the help desk, which has significant impact on both the operating cost and service availability of a corporation. It is closely tied, both in principle and process, to the problem, project and asset management functions.

Each affects the other and therefore should be included in the planning and implementation process. The change management system should encompass an assessment of eight factors:

- Risk
- Justification
- Lead-time
- Supporting documentation
- Impact
- Communication
- Contingency plan
- Any training or additional education required

By participating in the change management process, the help desk can proactively contribute to the success of new application rollouts, system upgrades and other changes in the IT environment. If change just "happens" to your help desk, then you are missing out on this important best practice.

Implement Customer Self-Support Options

Often times help desks have not considered all available technological opportunities that promote customer self support options. These include but are not limited to making the help desk accessible through the Internet or intranet, implementing fax-back technology and expanding access to solutions databases and troubleshooting aids.

Understand Outsourcing as a Tool

Because of its long-standing place in the technology sector, companies have become very comfortable with outsourcing certain parts of their business. At some point every business support function becomes a candidate for outsourcing. The benefits enjoyed by an organization utilizing outsourcing include:

Complex problem resolution: Three to five years ago, the questions most support organizations faced were the simple ones, such as “How do I cut and paste?” Although many people have been using the same products for several years, many of them are not knowledgeable about particular product features or aware that these features even exist. One opportunity for outsourcing is to outsource certain features or functions. For example, the help desk can focus on resolving only cut and paste types of issues typical in off-the-shelf software and outsource more complex or application specific questions to a certified group.

Greater customer focus: Another issue is budgeting the time spent by analysts on time-consuming problems. Since the help desk’s real value is its people, especially their knowledge and abilities, using them to solve lengthy problems is not the best utilization of their skills. Analysts should be doing what they do best: Serving and looking after customers.

Front-end or back-end outsourcing: Often, an excellent operational strategy is to direct specific calls to an outsourcer, allowing legacy calls to be directed specifically to an internal group of analysts. This provides a total solution and seamless call support, allowing the help desk to focus completely on unique problems affecting their help desk community.

Focus on Core Competency

One of the arguments most commonly heard in support of outsourcing it allows the company to concentrate on its core skills, business and competencies.

Most help desks’ core competencies are now being defined as concentrating on the customer and not necessarily on problem solving. As the industry continues to migrate into the support service role, they should continue to focus more on customer service. Essentially, this transition involves becoming more of an account manager for the customer, and includes: communicating with and visiting the customer, providing problem elimination, root cause analysis, quality control and change management.

Help desk core competency is no longer just the help desk; it also includes additional tasks that were formerly performed by adjunct roles.

Utilize a Team Approach

Team skills do not come naturally to most people. Successful teams have members who have received team skills training, or are just lucky! In a successful team, each person understands the direction in which the organization is going and will have enough information to make a commitment to team success. Members can identify key issues that prevent the achievement of the vision and work to resolve them, and develop an understanding of the thoughts and feelings of other team members regarding the organization, its structure and direction.

Additionally, members learn and model effective communication and feedback processes. Training is a key ingredient of teams that achieve long-term success, and it starts with the leaders of the service organization.

Being involved in a learning team atmosphere provides hands-on experience to all members in many aspects of support. It also creates a sense of belonging that promotes both better performance and higher morale.

Integrate Support Enabling Technologies

There is no excuse for stand-alone technology today. The current ability of technology to interpret customer data requires that support organizations focus on designing and implementing systems (and the processes that support those systems) that will share data. Customer data and problem resolutions are assets that carry both a cost and a value. One leading example of the effective use of integrating support-enabling technologies is the application of computer telephony interface (CTI) in the help desk for ease of usage by callers as well as a correct call routing to agents, thereby limiting the number of times a caller must be transferred. In order to achieve and maintain effective and efficient support, a help desk should consider the top 10 productivity-enhancing capabilities, including:

- Automatic wrap-up
- Automated customer feedback
- IVR application tuning
- Screen-based telephony
- Automatic database query
- Data prefetch
- Blended call handling
- Voice/data transfer
- Screen pops
- Context-driven call routing

Summary

If you are involved in setting and maintaining operational strategies and implementing best practices, you could see improvement in all functional areas of the help desk. Support organizations could also realize an ROI in many other areas not traditionally tracked such as “lost work time due to system outages” or work stoppage from coworkers trying to help their coworkers out by attempting to fix the problem themselves.

Being the best doesn’t happen over night, and it certainly does not happen by accident. It takes planning, skills, courage, resources, and the guts to make the right and sometimes difficult choices. Use of best practices in any help desk operation is clearly the cornerstone of a successful support organization. The help desk should no longer be viewed as a “necessary evil” but as an intricate player in the company’s success in our ever stressful, ever changing business climate. Be brave, be strong, and above all else, be the best!

Visit us at www.spherion.com to learn how your entire organization can optimize your help desk environment, enhancing productivity and end-user satisfaction throughout your organization.