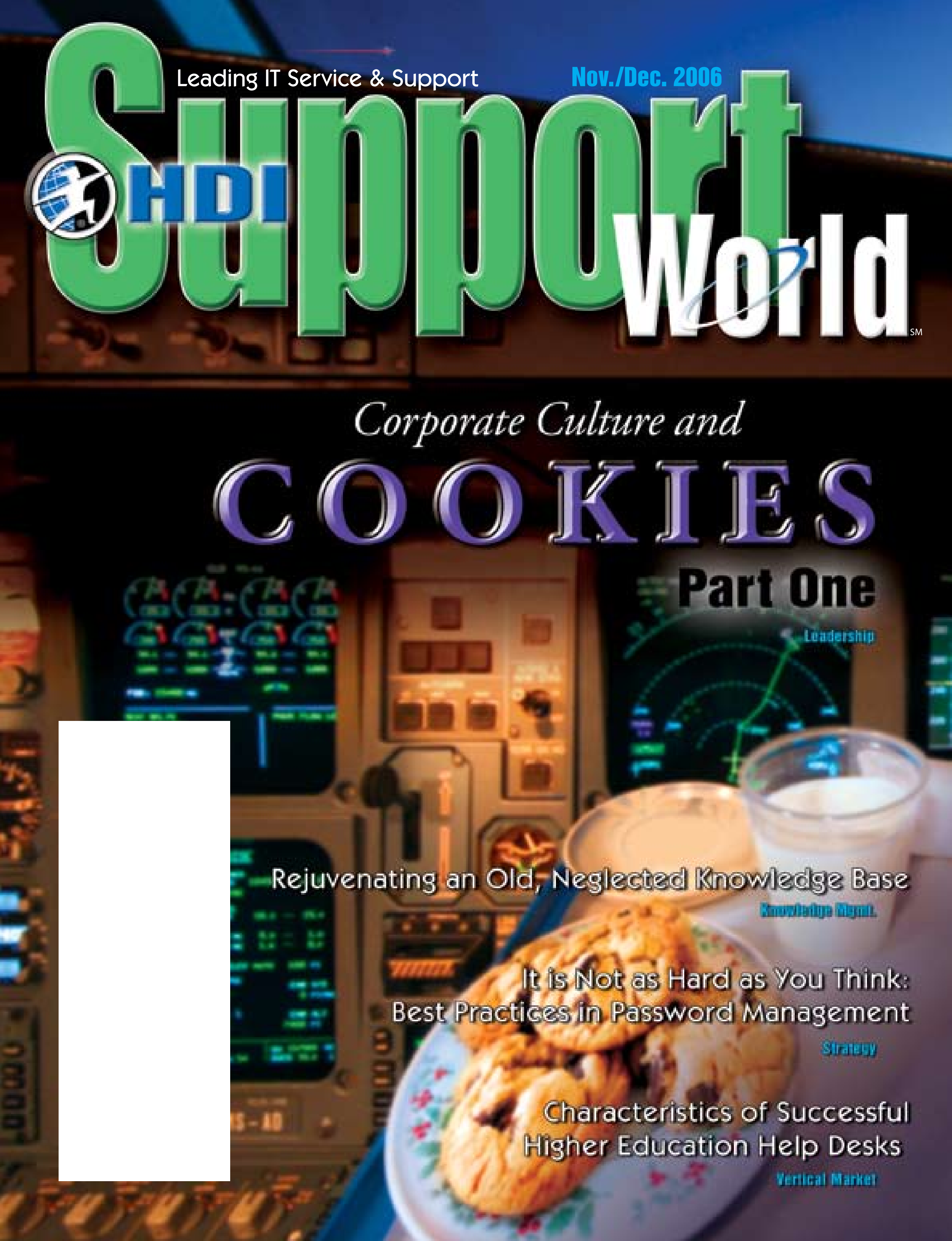


Leading IT Service & Support

Nov./Dec. 2006

HDI Support World[SM]

Corporate Culture and COOKIES Part One

Leadership

Rejuvenating an Old, Neglected Knowledge Base

Knowledge Mgmt.

It is Not as Hard as You Think: Best Practices in Password Management

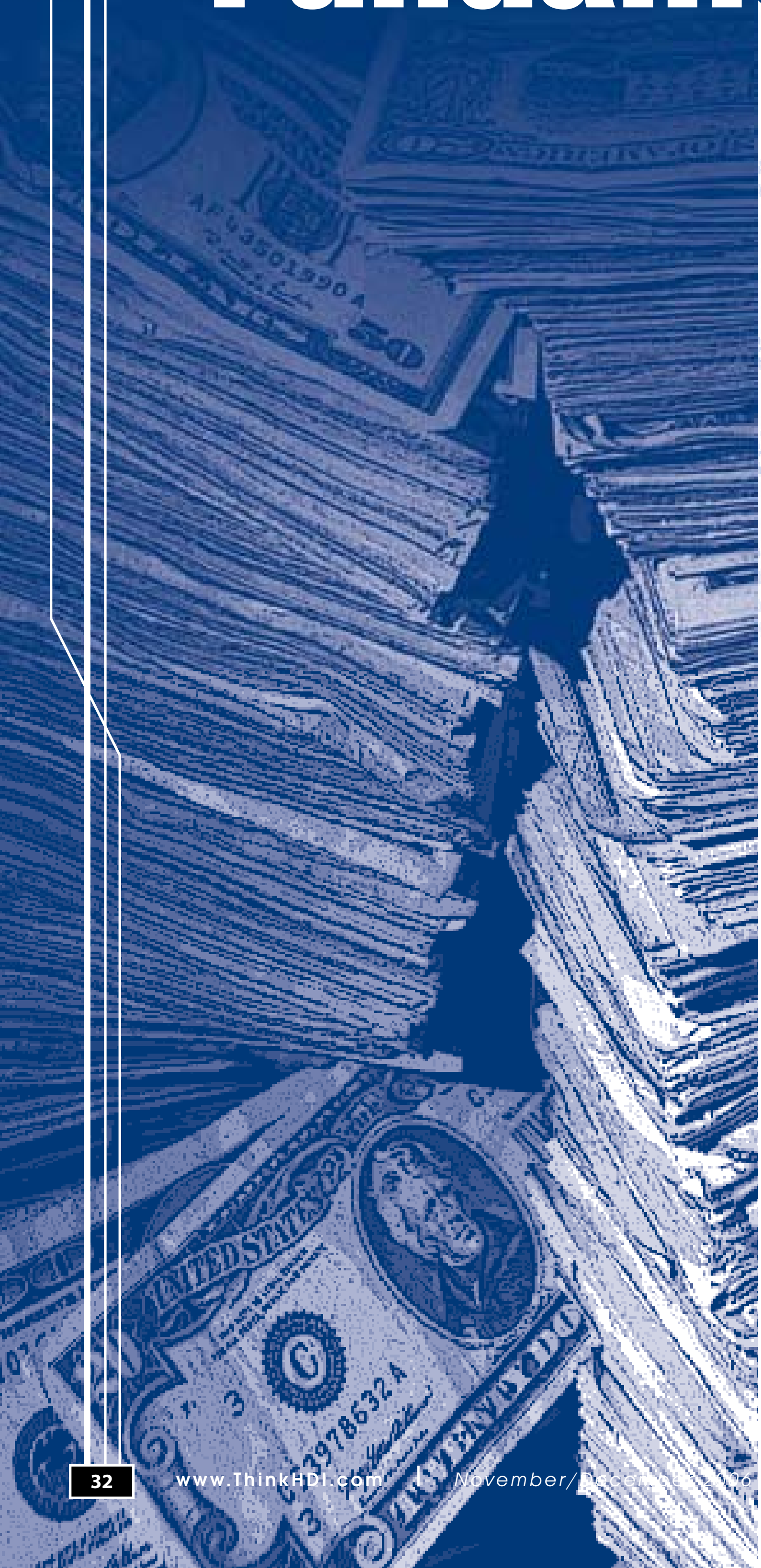
Strategy

Characteristics of Successful Higher Education Help Desks

Vertical Market

Beyond ROI Fundamentals: Met

Part 2

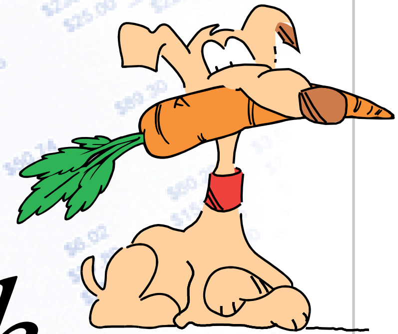


Part 1 of this article, entitled "ROI Fundamentals for the Service Desk: Justifying a Purchase," can be found in our September/October issue and included an overview on setting up a functional ROI calculation for justifying your service desk application costs. I concluded that article with the thought that a new ROI calculation should not just be an exercise for exercise sake, and that while ROI justification is a good foundation, a richer benefit can be achieved when your ROI processes establish goals that bolster morale and performance.

Let's face it. Help desk tools are not cheap. There's the cost of purchasing the tool, then there's the soft costs of implementation, training and ongoing evaluation, and maintenance to ensure that the tool continues to be effective. As business managers, we are responsible for ensuring a reasonable ROI on all our purchases; the challenge is ensuring that we provide ROI data without negatively impacting morale or performance.

While good help desk tools can provide phenomenal metric data, its important to recognize the human impact on implementing such a tool. If your environment has traditionally been one of "post-it note management" when a help desk tool is initially implemented, your support reps are likely to be fearful that the tool will become "big brother" and that metrics will become a concentrated focus. The first and most important step in your implementation of metrics is to assure your people that this is not the case. They can, and will, benefit from the metrics that the tool provides. The next equally important step is to prove it. To do that, it's important to use metrics as a carrot and not a stick.

rics as a Carrot and Not a Stick



by Ryan Terrell

Carrot #1:
Use Metrics to Get Additional Headcount
People outside the realm of IT typically think of the "help desk" as a place where broken things get fixed. While this is true, it's rarely where the bulk of our staff's time is spent. In reality, we do a whole lot of training. So, one of the first things to look for is, "How many calls per day/week/month/quarter/year do we get for different issue types?" Don't get overly granular. Usually it's sufficient to classify each call by type:

1) Problem [something is broken or defective]
2) Training Issue [answering the "How do I?" questions]
3) Work Request [move, add, change]

Having this data available will provide you, as a help desk manager, the ammunition you need to justify why you need additional headcount even though hardware isn't broken. Once you have the "how many," you can use "time worked" data to prove out the theory that training issues take more of your staff's time than break/fix, and are often more repetitive in nature. This information can justify user training and or additional headcount to ease the burden on your staff. Whichever solution is provided, be sure to let your team know that it was "their data" that effected the change!

Carrot #2:
Use Metrics to Reward "Good" Support Rep Behavior
A monthly contest can be a helpful tool for things that support representatives may initially see as simply more work or micromanaging. Rewarding your staff for items like proper knowledge base entries, least escalation, or most closed calls can help alleviate some of the initial resistance to a new tool. Monitor the contest…it's human nature to be competitive and want to win, but ensure that if you are rewarding "most closed calls," those calls don't get re-opened in a week! Also, some areas of expertise require more time to achieve issue resolution—be certain to limit the competition to areas with similar idiosyncrasies. For instance, folks that do nothing but reset passwords are naturally going to be able to close far more tickets than folks troubleshooting security issues.

Carrot #3:
Use Metrics to Reward Your Customers
Offer an incentive—perhaps a tote bag or gift card—for "Largest Change in Call Type" (less calls, more customer created tickets) or "Best Ratio of Surveys Sent/Surveys Completed." Be creative! Think about the behavior that you want your customers to exhibit and then reward it publicly. This can certainly help with getting users to use self-help tools and minimize complaints about call-back or hold time.

Once you have used metrics to drive the behavior you want, you can start to get a handle on ROI. While it's difficult to put a value on customer satisfaction, it's easy to watch the number of calls go down and associate a value with the manpower needed to resolve those calls. As calls are closed more quickly through the use of knowledge bases by customers and support reps, you'll also see a durable financial return.

So there you have it. You now have the tools in place to calculate and justify your service desk's ROI and set goals aimed at increasing morale and performance, therefore optimizing your service desk activities.

Ryan Terrell is the Vice President of GWI Software, a service desk solutions provider since 1992. He has spent the last eight years co-managing help desk projects for small to Fortune 500 companies around the world. His experience in project management, business development, and cost justification has involved him in several hundred successful IT service desk deployments.