HDI SupportWorld™

Playing for Keeps: Finding Service Maturity with Total Contact Ownership

CONTENTS

REGULAR FEATURES

HOT LINKS

New Research: The Technical Support Center of the Future

What will the technical support center look like in the future? What skills with technical support professionals need to be successful? The answers to these questions and more can be found in the latest research report from HDI and Robert Half Technology.

www.ThinkHDI.com/Research

Upcoming Webcasts

September 17
HDI Buyer's Guide Live: An ITSM Solutions Spotlight
Sponsored by CA Technologies, EasyVista, and FrontRange

October 9
Think Service with HDI!
A Special Customer Service Week Event

October 15
The Four New Roles of the ITSM Leader
Presented by Charles Araujo

www.ThinkHDI.com/Webcasts

HDI Research Corner

HDI's research provides timely, pertinent information that you can discuss with your peers, share with your executives, and use to make informed, research-based decisions. Recent research covers topics like knowledge management, agent efficiency, remote support, and providing support using mobile devices.

www.ThinkHDI.com/BePartOfTheCorner

HDI Buyer's Guide

Share your comments, feedback, and ratings on the products featured in this new online tool.

www.HDIConnect.com/Buyers-Guide

Letter from the DIRECTOR

Dear *SupportWorld* Readers,

Since releasing "The War for Talent" research report last year, we've been tracking the progress of several forces that are changing our industry: evolving roles and responsibilities, blended support structures, difficulty finding properly skilled professionals for today's projects, and new skillset requirements for the future. Alongside those changes—perhaps the underlying driver for these changes—has been a renewed focus on both internal and external customers. Consider these recent findings from HDI research:

- Eighty-eight percent of industry leaders believe that **a passion for supporting customers** will be the top competency for technical support organizations of the future.

- Companies that provide the **top five most desired perks** experience 13 percent less turnover than companies that do not.

- Eighty-six percent of companies cite **customer demands/ expectations** as the primary reason for offering multiple contact channels, with 81 percent citing improved customer experience.

- Of the organizations that reported a decrease in desktop support tickets in 2013, more than 37 percent indicated that **the use of remote support tools** was a significant factor.

- Of the many hats technical support professionals will wear in the future, **customer advocate and customer productivity enabler** top the list by a wide margin.

The juxtaposition of talent retention, employee satisfaction, evolving support channels, and customer advocacy is no accident. The role of technical support is changing rapidly, and technical support organizations face mounting pressure to deliver measurable value to the business while dealing with game-changing technological shifts, like mobility and virtualization.

With this dynamic landscape in view, this issue focuses on the human factors of technical support. In the cover story, Pete McGarahan proposes a new solution for total contact ownership.

In the Daly Interview, I sit down with Citrix's Elizabeth Cholawsky and Scott Thompson to discuss customer-centric support. Then, building off of Julie Mohr's recent article on the customer experience, Roy Atkinson uses a plausible scenario to explain why managing the customer experience is so important. Mia Melanson provides insights into coaching, while Fancy Mills trains the spotlight on the most important workforce management metrics. Meanwhile, Mark Fitzgerald explains how public institutions and private organizations alike can take advantage of the latest classroom technology innovations. Finally, Phil Gerbyshak outlines a four-step process for creating a rewards and recognition program that is meaningful, unique, specific, and timely.

Remember, Customer Service Week is just around the corner. Take time to celebrate your customer support teams, replenish your spirits, and renew your commitment to the customer. As always, we welcome your feedback. Please send your comments and suggestions to **Editor@ThinkHDI.com**.

Kind regards,

Cinda Daly
Director of Content

STAFFING STUDIES: SALARIES, STATS, AND SKILLS—OH MY!

By Jenny Rains

Come one, come all! We've got ratios, stats, salaries, and skills! You have questions about staffing in the technical support center, HDI's research has **answers**!

The technical support staff is the voice, and often the face, of IT. Over the past couple of years, HDI has conducted several studies on staffing in the technical service and support industry, focusing on topics like hiring, retention, staffing structure, salaries, skills, and the future. By bringing together data and analysis from several of these studies, this article provides a comprehensive overview of staffing today and in the near future.

STAFF STRUCTURE

While the traditional support center structure continues to be the norm, recent research gives us a clearer view of what is most common, what changes are coming, and what has been successful with regard to tiered support, single point of contact (SPOC), and

desktop support models. This article highlights some of the key research results, which you can explore more deeply in the full reports and briefs.

The reports, briefs, and infographics featured in this article include:

Support Staff Structure

2013 HDI Desktop Support Practices & Salary Report

The Technical Support Center of the Future

The War for Talent

· · · · · ·

All of these resources can be found at **www.ThinkHDI.com/Research**.

Most support organization have a tiered support model in which tickets are moved from basic level 1 support to a more sophisticated level, based on time limits, ticket types, skillset required, special customers, service level commitments, and/or other criteria. Sixty percent of survey respondents reported having a tiered support model in their organizations, with an additional 33 percent reporting having a modified model of tiered support.

A small portion of the industry is currently tier-free. Organizations with this type of model tend to be either very happy or very unhappy, rather than middle of the road. This polarization could indicate that some organizations do not have tiers because they are small and/or immature, while others are tier-free because they've made a strategic decision to move to that type of model. For example, organizations that support complex, mission-critical applications often assemble teams of experts that work collaboratively (i.e., no tiers required) toward problem resolution.

Thirty-seven percent of organizations recently added tiers to their service desks; these tiers were either acquired from other areas of the organization (28%), created new for the service desk (23%), or both. Fewer organizations (15%) are decreasing or eliminating support tiers entirely.

Tiered or not, most organizations (86%) have a single point of contact (SPOC) for connecting with technical support. In 84 percent of organizations, the service desk is the SPOC, either resolving and/or fielding tickets, while 14 percent of organizations allow customers to contact higher levels of support directly (e.g., levels 2 or 3). Just two percent have a SPOC that is located outside the help desk/service desk. In addition to being the most common practice in the industry, organizations in which the service desk is the SPOC are happier with how their support staffs are structured.

How does desktop support play into the support center's structure? Recent research indicates that while support center and desktop support teams provide distinct and separate functions in most organizations, a blended model appears to becoming more popular. In 2013, 38 percent of technical support organizations reported using a blended ("jump-and-run") model, up from 35 percent in 2012. Those organizations that do have dedicated desktop support technicians are supporting 310 end users, which translates to 620 devices per technician.

HIRING AND SKILLS

Recent research conducted by HDI and Robert Half Technology shows that there's a war for talent underway in the technical service and support industry. The vast majority of technical support organizations (72%) report that they're hiring; 24 percent are expanding (creating and filling new positions), while 48 percent are working to fill positions as they become open. However, there's simply not enough skilled talent available to fill these positions.

With a large portion of the industry searching for support staff talent, nearly half of respondents (47%) report having difficulties finding skilled professionals for frontline/help desk jobs. More than half (59%) say they're unable to find skilled professionals for management positions, and almost two-thirds (62%) say they're

having trouble locating qualified candidates for escalated levels of support (i.e., levels 2 and 3 and/or desktop support roles).

To view this infographic, visit
www.ThinkHDI.com/Topics/Research/War-for-Talent/Infographic.aspx.

The unique skillsets needed to be successful in providing escalated levels of support helps explain the reason for this limited talent pool: prospective hires in this class must have a blend of skills, including problem-solving and troubleshooting skills, technical skills for specific software and hardware, and customer service skills. The chart below lists the top five skills currently needed for frontline support, escalated support, and support center management.

Skills necessary to be successful in various technical support roles:

Frontline/help desk

Customer service skills	66%
Problem-solving /troubleshooting skills	54%
Communication skills	50%
Ability to learn quickly	45%
Ability to work under pressure	39%

Escalated support (L2, L3, desktop support)

Problem-solving /troubleshooting skills	60%
Technical skills for specific software(s)	42%
Technical skills for specific hardware(s)	33%
Ability to work under pressure	30%
Customer service skills	30%

Management

Leadership skills	66%
Communication skills	49%
Strategic thinking skills	48%
Organizational skills	38%
Ability to handle change	30%

Characteristics the support center needs in the next three to five years:

Characteristic	Percentage
A passion for supporting customers (i.e., a customer service mindset)	88%
A desire to continue learning about technologies and trends (on and off the clock)	80%
Social intelligence (i.e., human connection in a digital world)	75%
A proactive approach to solving problems and/or creating efficiencies	71%
Greater collaboration with staff inside and outside the technical support center	71%
Adaptability/ability to embrace change	70%
More frequent and formalized knowledge sharing	70%
A deeper understanding of the business being supported	69%
The ability to multitask effectively	69%
Creativity/innovation	66%
A higher level of technical skills	66%
Skills for providing support through chat	63%
Strategic thinking	48%
More generalists providing support	42%

In research released this past July, HDI and Robert Half discovered that, in the near future, technical support centers will need even more diversified skillsets to address the rapidly evolution of technology, its essential role in business operations, and users' expectations about their technology experience and anytime, anywhere access.

More than three-quarters (76%) of support professionals anticipate that support center professionals will soon be required to play the role of customer advocate to IT (if they aren't already), and 53 percent believe that the support center will serve as the business relationship manager. In addition, more than half of respondents expect to be the liaison between their organizations and cloud services providers and/or mobile device vendors.

RETENTION

Because finding qualified candidates can be difficult, retention is crucial. In the technical service and support industry, it takes nine to ten weeks to fill a management position, from the time a vacancy is posted to the time it is filled. For levels 2 and 3 and/or desktop support, it takes seven to eight weeks; for frontline/help desk roles, five to six weeks. During this time, other employees are being required to pick up the responsibilities of the vacant position, which leads to burnout and higher turnover.

However, turnover can be turned around. *The War for Talent* revealed that turnover is less of a problem for organizations that provide these four perks, which survey respondents identified as the most valuable (in descending order of value): paid time off, medical insurance, retirement benefits, and flexible work hours. But organizations can also improve retention by addressing the most frequent causes of turnover. In the technical support industry, compensation is the most common factor contributing to turnover (57%), followed very closely (56%) by limited opportunities to learn, grown, and advance. Technical support professionals don't want to fall behind and lose either their value to the organization or their marketability as a result of slashed training budgets. When opportunities to learn are limited, staff may begin looking elsewhere for employment. By simply providing learning opportunities, organizations can retain their current employees, which translates into real savings.

. . . .

Staffing structure, hiring, skills, retention—we have the data and analysis you need to make informed decisions about the forces shaping the technical service and support industry. Join your peers in participating in our monthly and annual surveys and help us help you stay ahead of the curve. To learn more a bout HDI's research, visit **www.ThinkHDI.com/Research**.

ABOUT THE AUTHOR

Jenny Rains is HDI's senior research analyst. She has worked with HDI in a research/analysis capacity since 2003. Before coming to HDI, Jenny was the research/data analyst for one of the largest school districts in Colorado. Her areas of expertise include survey development, research design, data analysis, program evaluation, and project management. Jenny received her BS in psychology from Sam Houston State University and an MA in experimental psychology, with a focus on research and statistics, from the University of Colorado in Colorado Springs.

The Daly Interview: C-Suite Perspectives

By Cinda Daly

Customer-Centric Support: The Key to Customer Loyalty

With Elizabeth Cholawsky, VP/GM, IT Support and Access Lines of Business, SaaS Division, and Scott Thompson, VP, Worldwide Technical Support, Citrix

Customer Service Week is right around the corner, so in this interview we're focusing on the customer from the perspective of a leading technology company. This is a conversation about how the customer experience, workplace culture, and technology are tightly fused and completely customer-centric, from the front lines to the executive boardrooms. Citrix customers are at the core of every discussion, every new product, every problem resolution, and every innovation. "Citrix has developed the organizational fortitude to put—and keep—the customer first, no matter what," says Elizabeth Cholawsky, VP/GM of the IT Support and Access lines of business. "No matter what" is an impressive goal. How does Citrix maintain this commitment and focus on its global customer base?

Cinda Daly: What makes Citrix's customer service philosophy come to life every day?

Elizabeth Cholawsky: We're a technology company. We believe that world-class technology and the infrastructure it rides on are important to delivering a great customer service experience. When I was first running support for Citrix's SaaS division, the first thing we did was overhaul the infrastructure to give us a 360-degree view of the customer and the ability to instantly access their issues and respond to their requests. To be customer-centric, you must know your customer. For businesses at scale, customer data gives you that knowledge.

Really delighting our customers is also important to making a great customer service tool. We know the support products intimately, and we leverage those products. Our products are built around the same customer-centric philosophy that we use to run the business. By infusing our product set and our culture with our philosophy

of respect for the customer, we're now known for great customer technology *and* great customer support.

Scott Thompson: Our number-one priority is delivering that world-class customer experience. It drives the way we organize our teams, the people we hire, the systems we use, the way we train our people in the use of those systems, and, ultimately, the way we measure our success.

Daly: Scott, you lead the global organization responsible for supporting Citrix customers and partners around the world. How do you maintain Citrix's standards in this global community?

Thompson: Our hiring practices are a foundational piece in terms of building our teams around the customer experience. The individuals we seek must have strong technical aptitude, obviously, but we put a lot of emphasis on communication skills and people skills during the interview process. Citrix's standards are at the core of our training, beginning with our onboarding program, and they ensure that the service experience is consistent across the board. We also measure the performance of every engineer on every team wherever they are in the world, making sure that the customer focus is consistent and fully aligned around our customers' objectives, from the top down.

Cholawsky: The single most important thing that drives our ability to maintain a great customer support standard is the emphasis on listening to the customer. That's an overused phrase, but if you break it down, it means you use established techniques, methods, and habits to keep everyone focused on what the customer is actually saying. It permeates everything we do. From a product perspective, for example, before we release anything, we take it through a market validation process. That process involves talking with a representative set of customers and prospects about their problems and discovering if what we plan to deliver is really going to solve those problems.

We've built connections into the architecture at every point where customer interactions could occur—from embedded surveys to the "happy faces" you see in our service desk product—which give immediate feedback. This immediate feedback is fundamental to the benefits of our SaaS-based products. We've built in the habit of looking at customer interaction data in a constant feedback loop. We actually *use* the tools we develop and market, so our own customer service organization is an integral part of our quality efforts and that customer feedback loop.

Daly: What are the core competencies you expect from your service organization? How do you see those requirements changing in the future?

Cholawsky: Our way of interacting with customers has changed dramatically over the past couple of years. It's the whole revolution of social channels and how customers are adopting them to get support. This has forced us to change the profile of our recruits. We need people who can be a lot more independent than traditional customer service agents, people who can think on their feet. Adding the chat channel boom into the support fabric widens the net for those you can recruit, particularly in the area of language skills and accents.

Daly: That opens the topic of social channels and the degree to which you've integrated them into your services.

Cholawsky: At every point, we have insight into how people are feeling about the product, whether they are being successful or not. Customer-initiated support, mostly through chat, is the hook into the social fabric, and it's having a major impact. The interesting thing about self-service and support communities is that if customers get an answer, they're very happy. It's their preferred channel, and it's a low-cost channel. But if they don't get an answer, they're really unhappy, much more unhappy than if they'd talked to an agent directly. We're solving that challenge with the chat connection. Customers begin at their channel of choice, whether that interaction begins in the social world or in a self-help area. But if the problem is too hard or they're not finding their answer, they have a release valve to escalate the problem and get immediate help from an agent.

Thompson: We're continuing to leverage the community and partners to help service our customers by building out our knowledge bases and providing opportunities to integrate that knowledge into self-service tools. The emphasis on customer advocacy and the focus on our customers' success—helping them accelerate the business value they get from our products—really define the customer service organization. We have the most interactions with the customer, so we're very integrated with the product development cycle, allowing us to design and build our products from the customer's perspective. It's an effective, synergistic relationship.

Daly: You raise a good point about the value proposition, which you have to deliver every day in a highly competitive environment.

Thompson: The key point is understanding how the customer perceives the business value and how they achieve it. That value could be a successful project, cost savings, better analytics—anything. We need to understand what that is and do whatever is possible to help accelerate that success for the customer.

Cholawsky: About a year ago, we created a customer advocacy position and placed one advocate on the development team for each product line. These advocates come from the support organization, so they understand the customer perspective. They're like journalists embedded in the

product development team, and it's worked really helped keep the feedback loop going.

Thompson: We have a similar group in the services organization, which we call the "Customer for Life" team. These employees serve as customer advocates, measuring our customers' overall health, which includes how they use the product and how we engage and service them in the interest of helping them become lifelong customers.

Cholawsky: One example from support is the shift away from first contact resolution as a key metric. FCR doesn't say whether you've actually helped customers solve their problems or not. We look at the customer holistically: What are they calling or chatting about over time? Did we solve that one incident only to get five more incidents over the next few weeks on a tangential problem? We're all recognizing that we have to deliver more value to our customers, and that value is how customers will define the benefits they receive.

Daly: How are you measuring customer satisfaction?

Cholawsky: Net Promoter Score (NPS) is *the* measure, and we monitor it to see how we're trending. More important than the numbers, however, are the free-form questions and the responses we get to those questions. We have an entire analytics group that reviews those comments and turns them into business cases, determining how important those comments are to address in our product. It's all part of our feedback loop, and it's a richer feedback engine than NPS alone.

Thompson: We believe in and deliver support through any channel, on any device, across multiple languages. It's not a trivial feat. We leverage a variety of industry-standard measures to analyze customer satisfaction. Beyond that, we continue to take a holistic view of our customers and their overall experience with us as a company. That's every interaction across the entire lifecycle—interactions with the sales team, the product itself, the support team—taking it beyond a single transaction. We look across all those channels and try to ensure a consistent experience, with the ultimate goal of making sure our customers are successful with our products.

Daly: Which technological innovations are going to have the most lasting impact on customer interactions and relationship management going forward?

Cholawsky: Intelligent chat and social reach will continue to evolve. People have adopted our collaboration tools and applied them in a broad way over the past eight years. Today, we're applying this technology to the support world, creating a space where agents can collaborate dynamically on a customer call, silently or publicly, as the case may be. We're looking very closely at our video technology because we're hearing from our customers that they believe video support is a differentiated way of delivering service. They believe they can leapfrog their competition or create a premium product by making their support agents available via video. We're also experimenting (internally, for now) with community chat, where an agent is available to video chat with multiple customers at once, answering questions in a moderated forum, which generates much higher customer satisfaction than support from an anonymous forum.

Thompson: We're making the shift from being less reactive and more predictive in our support practices, to detecting the smoke before it becomes a fire. Using predictive analytics, we identify key trends and issues before customers experience service degradation, and we continue to drive innovation by building that proactive, predictive capability into the product. This includes self-healing tools that address a situation at the root before it becomes an issue. My vision, beyond the consistent customer experience, is that products and customers should be able to resolve issues on their own (self-healing and self-service). That's the great experience I want, and that's the experience we want to provide for our customers.

Daly: What can other leaders, global or local, take away from the Citrix experience?

Cholawsky: The key takeaway is back where we began: A world-class technology infrastructure is a way to ensure that you really know your customers, can keep delivering on key support tasks, and can streamline both your own efforts and your customers' efforts. This creates a great experience for your customers. But integration across all groups in the company—CRM, billing, HR, marketing, and so on—is required. Service organizations can't do it alone.

Thompson: Integration is important, in general, for companies to move forward, and it's particularly critical for supporting mobile work styles. Systems integration is the key enabler for delivering great customer experiences and measuring customer success, across all channels, from your customers' point of view.

ABOUT THE AUTHOR

For more than twenty-five years, Cinda Daly has managed teams, written dozens of industry articles and thousands of pages of technical documentation, developed training courses, conducted sales and service training, and consulted in the technical support and customer service space. In her current role, as HDI's director of content, she is responsible for HDI's virtual events, research, and print and electronic publications.

Bridging the Gap:
A Service Lifecycle Approach to Implementing Knowledge Management By Paul Dooley

There seems to be increasing interest in knowledge management (KM) these days. Even Google is no longer driven solely by the desire to be the best search engine; instead, Google is focusing on knowledge management, promoting its latest **Enterprise Search** product as a key device for tapping into an organization's collective knowledge.

Service providers have come to the realization that their departments simply are not sharing information as well as they could. There are just too many silos, which inhibit the free exchange of shared knowledge, ideas, and experience. The result? Poor decision making, agility, and knowledge discoverability. When knowledge isn't captured and shared effectively, the risk of making a less-than-optimal decision increases.

Duplication of effort is another consequence of poor knowledge management. Without proven, reusable solutions, support analysts have to reinvent the wheel, developing solutions to problems that have already been solved. This, in turn, increases average resolution times. In addition, since backline subject matter experts aren't sharing information with the frontline support center, those frontline support center analysts have to escalate more tickets to higher-level support teams. When resolution time and escalations increase, customer dissatisfaction tends to be the result. All of this drives up the cost of technical service and support, which management, of course, is keenly interested in driving down.

A process-driven, best practice-based knowledge management implementation can help address these challenges, resulting in huge productivity benefits and cost savings, for support organizations and their customers/users. But how do we bridge the gap? The first step is recognizing that the costs and impact of poor knowledge management are real, quantifiable, and significant to both the support center and its customers. Then, calculate the costs and impact of KM-free support and compare it to the costs and impact of a knowledge-centered approach, one

built on capturing, storing, and reusing knowledge across the support organization. (Use HDI's **Knowledge Management ROI Calculator** to determine the potential return on an investment in knowledge management.) If your cost/benefit analysis and ROI calculations show that a knowledge management initiative is a worthwhile strategy, start adopting and embedding knowledge management practices throughout your organization.

Knowledge Management: Humble Origins, Great Potential

As far as support organizations are concerned, knowledge management isn't a new concept. The **Consortium for Service Innovation** pioneered and has been promoting the value of effective knowledge management for more than twenty years. Its Knowledge-Centered Support (KCS) model has been widely adopted by support centers in the world's leading companies and organizations. Due to increasing global competition, cost pressures, and demands for greater service quality, more and more support organizations are coming to realize the significant business value and impact true knowledge management can have on an organization.

ITIL 2011, the latest version of the ITIL framework, underscores this heighted level of importance. In the revised framework, knowledge management, once an ancillary process, has been promoted to a full-fledged ITIL process that should operate across an entire IT organization, with process owners, managers, and practitioners all contributing knowledge and benefiting from shared ideas and experiences. According to ITIL, a service knowledge management system (SKMS) is the collection of integrated databases and repositories that should hold this shared knowledge and experience, enabling managers and practitioners across the organization to get the *right information* to the *right people* at the *right time*, thereby improving solution strategy and planning, the design of new and changed services, and the quality of build, testing, and deployment of new or changed services to the live environment. Furthermore, by making solution reuse and knowledge sharing a reality, support organizations can reduce escalations, decrease average resolution time, improve staff utilization, and lower their overall operating costs.

Five Obstacles to Implementing Successful Knowledge Management

So why on earth isn't everyone "doing" effective knowledge management? There are several common obstacles to the successful adoption and practice of knowledge management, but there are ways to overcome them.

Obstacle #1: *In support organizations that insist on a tool-centric approach, management mistakes knowledge management for a tool or system, instead of an organization-wide process.*

This is an all-too-common phenomenon, since support managers and practitioners typically have an implementation/support technology background. Compounding this, vendors want nothing more than to sell knowledge management tools, systems, and databases to service providers. The problem with this approach, as the saying goes, is that "a fool with a tool is still a fool." A knowledge management tool will not produce a knowledge management process. That requires a process approach, first defining and documenting the process—delineating the guiding policies, the inputs and outputs, the steps of the process, the measurements, and how the process is to be embedded within the organization—*then* selecting and implementing technology to automate the process, boosting productivity and efficiency.

Obstacle #2: *Management may task a single individual with responsibility for knowledge management, rather than taking a team approach.*

Effective knowledge management requires complete buy-in and participation: everyone should feel like they have a piece of the action. That is, all support managers and practitioners, from the frontline service desk to middle managers to executive management, should feel like they're contributing to and benefitting from the knowledge management process. Designating one individual as the owner, manager, and caretaker of the organization's knowledge is a recipe for failure.

Obstacle #3: *Participation is difficult/complicated and time consuming.*

When there are too many steps involved in submitting or retrieving an article or solution, you are, in fact, erecting roadblocks to adoption and usage. Remove those roadblocks, and make the use of and contribution to the knowledge management system an integral part of the process workflow. For example, as soon as an issue is categorized by incident management, modify the process to trigger a search and automatically display suggested solutions in the workflow, instead of requiring analysts and users to navigate to another tab or window and enter just the right phrase to retrieve useful information. Keep the interface simple, user-friendly, fast, and effective. Make it *easy* to share knowledge.

Obstacle #4: *Organizations take a tactical and operational approach, ignoring the need for strategy and fundamental behavioral changes.*

If you build it, sometimes they don't come. Just because you've built and deployed a knowledge management, that doesn't mean people will gravitate toward it and start using it. The reality is that you will need to motivate people to contribute to and use the system. Knowledge management is one of those big changes that requires a well-thought-out organizational change plan. To be successful, you must start with a clear strategy and a compelling vision for the power of knowledge management to transform your organization. You'll also need to have strong management support and a "no turning back" transformational plan to design, transition, and roll out your knowledge management process across the organization.

Continual Service Improvement / Service Design / Service Strategy / ITIL / Service Transition / Service Operation

Obstacle #5: *Organizations don't bother to monitor or measure their processes and support systems.*

This obstacle is related to #4, namely that merely having a knowledge management system naturally drives adoption and usage. The reality is that if you don't measure it, you can't manage it and you can't improve it. Like any other process, you need to assign a specific set of metrics and KPIs to the knowledge management process, and you need to regularly report on the performance and value of that process. Stakeholders pay attention to what gets reported, and incorporating knowledge management performance reporting into your monthly scorecard will emphasize its strategic importance and value to the organization. It will also give support center management visibility into people, process, and technology improvement opportunities.

Overcoming the Obstacles: The Service Lifecycle Approach

Knowledge management is an organization-wide process, and, as such, you need to take a service lifecycle approach to its implementation. Use the guidelines documented in ITIL 2011, along with the KCS model and supporting systems and tools (like the SKMS), to guide the design, development, deployment, and operation of a knowledge management process.

Start with a service strategy. Establish a compelling vision for transforming your organization into a knowledge-centered service provider, along with a supporting mission, goals, and objectives.
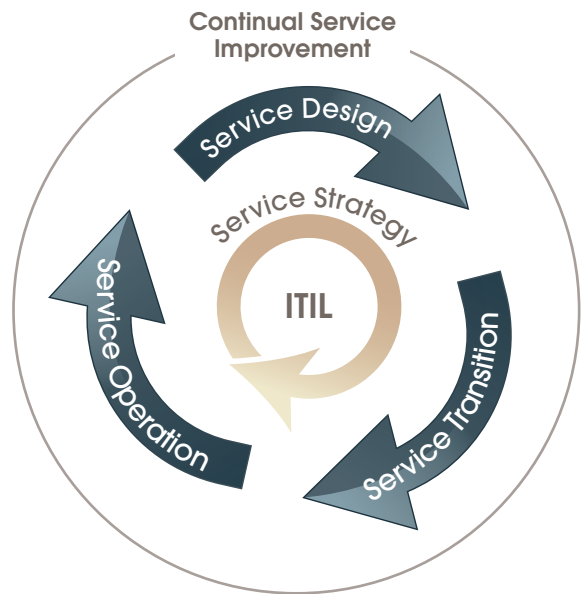
Develop a total solution approach by designing a knowledge management process, along with supporting systems, tools, metrics, and other elements, and producing a master plan for your knowledge management process implementation. Engage a project team to solicit organization-wide buy-in, and begin your journey.

Next, using your master plan as input, begin gradually implementing the various components: people, process, and supporting technology (it will take all three, plus organizational change). Embed knowledge management within your service operation processes. Make knowledge capture and reuse an integral part of every process: during event monitoring, while resolving an incident, when troubleshooting a problem, etc. The idea is to either access and put captured knowledge to work or capture knowledge in the workflow.

Finally, keep things going with continual improvement. Track metrics and report on the progress of your knowledge management process. Make monitoring and reporting on your knowledge management process's performance and value part of your monthly management meetings. Above all, always be on the lookout for ways to improve the knowledge management process, the people involved, and the tools and systems that support it.

ABOUT THE AUTHOR

Paul Dooley is the president and principal consultant of Optimal Connections LLC. With more than thirty years of experience in the technology and software development industry, he has extensive experience in service desk infrastructure development, support center consolidation, and the deployment of web portals and knowledge management systems, as well as service marketing strategy and activities. Paul has a BA in international relations from California State University in Fullerton, CA, and an MBA from National University in San Diego. He has his ITIL v2 Foundations and Practitioner certificates and is an ITIL v3 Expert. He is also an HDI Certified Instructor and auditor.

Get Involved with HDI at the Local Level!

HDI supports an extensive community of local chapters across the United States and Canada. HDI local chapter events provide attendees with opportunities to network with their peers, learn from guest speakers and industry experts, and make connections that benefit their careers!

Featured Chapter: HDI Susquehanna Valley
Join C-level executives and directors from multiple verticals for a deep dive into BYOD. How can we meet the needs of our organizations and the demands of our employees and still maintain information security?

When: October 11, 2013 | 1:00 – 4:00 p.m.

Register at **www.hdisvc.org**!

No HDI local chapter near you? No problem!
The HDI vChapter, a new virtual chapter, provides the same value as the traditional HDI local chapters, but allows you to attend meetings from anywhere in the world! Visit **www.ThinkHDI.com/vChapter** to learn more.

Find Your Local Chapter • 800.248.5667 • **www.ThinkHDI.com/LocalChapters**

Making Your Service Desk *Lean*

By Rebecca Duray
and Howard Williams

Most of us have had interactions with service desks, and most of us can easily recall experiences that represent, in one way or another, fairly common frustrations. For example, when Rebecca needed a replacement laptop, she called up the service desk and made arrangements to have the replacement sent—quickly. It never came. She called again…and again…and again, each time speaking to different agents who confidently assured her it was on its way. But even as her frustration grew, she was quite sure there were frustrations on the service provider's side as well. She could imagine the agents asking themselves why this customer kept calling about a standard request that the system showed as being in process. It takes time to investigate these kinds of exceptions (Did someone miss an approval? Was the mailing address incorrect?), and if their operation is like many we see, they could be working under enormous time pressures, perhaps with ticket backlogs, and finding the time to handle exceptions is a real problem.

Sometimes, no matter which side of the service desk we're on, it feels like we spend a lot of time handling these types of issues. Is *everything* an exception to a standard process? Putting aside our own frustrations for a moment, we have to adopt a big-picture view, where we look at the entire end-to-end process like a workflow, where customer calls, tickets, and information flow through the service desk on an assembly line of sorts. Ideally, our work process should be standardized in such a way that these elements flow in an orderly fashion, although we know that even assembly lines can experience delays, backlogs, and bottlenecks in processing, as well as defects in the final product. Fortunately, there *is* a way to design workflows that standardize processes while allowing for a variety of outcomes.

The 3V Model: Volume, Variety, and Variation

Borrowing from manufacturing, we begin with a simple conceptual model that can help us understand the dynamics underlying many workflow problems. The 3V Model is derived from the discipline of operations management and it looks at operational workflows in terms of three different variables:

- The **volume** of customer requests (ticket or call volumes, representing the customer demand)

- The **variety** of customer requests (types of tickets or calls, representing the number of different customer requests, each one of these different types typically requiring a different way of handling)

- Process **variation**, or how the request is handled (the amount of variation in handling requests, reflecting the separate handling requirements associated with *different* ticket types, different ways of handling requests of the *same* type, and exception handling of one sort or another)

In an environment where tasks are highly repetitive, as we might see when there are large numbers of the same types of requests, we would expect the same types of tickets to be handled the same way each time. After all, to be efficient, high-volume tasks should have standardized processes. But very often this is not what we find, and the reasons underlying this process variation are sometimes surprisingly unplanned: people who do the same thing don't communicate with each other, standardization was never a priority, employee turnover discourages continuity, no investment in centralized repositories for documented procedures, and so on.

Looking at problems in service desk operations through the 3V lens allows us to consider the influence of each in turn when we're dealing with scenarios where the interactions between these three variables introduce complexities and, when managed poorly, instabilities. For example, too much process variation is an unstable foundation that makes it difficult to manage variety. Introduce unanticipated spikes in volume and the entire environment will be challenged to meet the demand. We often

see numerous signs of failure under these conditions, expressed in terms of longer time delays, larger backlogs, increased number of defects, reactive crisis handling ("All hands on deck!"), decreased employee morale, and lower customer satisfaction.

What we've just described is the extreme case, but there are many service desk environments that suffer from mild forms of these symptoms over extended periods of time. Management and staff often just get used to this state of affairs, tolerating suboptimal performance in the name of getting by. There may be less urgency in this scenario, but the underlying workflow dynamics are the same.

Solving Problems

Now that we have a more nuanced understanding of these operational problems, what do we do next? The first thing is to understand each problem as it relates to a specific environment. Since we encourage our clients to look at each variable separately, let's put together a narrative script that takes us from the statement of the problem and its symptoms to a description of some underlying causes of these problems. Then, let's identify some approaches to problem solving, with reference to some methods, tools, and techniques that can be used to aid in remediation.

Our approach revolves around planning and managing these variables. We don't want to be surprised by unforeseen changes in ticket volumes, for example, so that means we have to anticipate and manage volumes in a dynamic supply-and-demand formulation. There is such a thing as too much variety if a large number of tickets defy conventional (and planned) categorization, as we find in cases of exception processing ("I never saw that request before!"), so we need to explore ways to reduce *unnecessary* variety or define standardized processes that can handle a portion of the variety (i.e., a process for handling exceptions). The same notion applies to process variation. There is often much more of this than we see on the surface, so we need to make it transparent, and then we need to reduce variation through the application of standardized procedures.

The problem-solving script we use is a simple one that calls for understanding the problem using root cause analysis and then identifying appropriate solutions using methods, tools, and techniques derived from Lean management. Lean is a widely deployed and very flexible set of practices that are geared toward eliminating operational inefficiencies.

In the Lean approach, root cause analysis is more of a cultural orientation, one where we apply a form of scientific thinking to our operational issues. In other words, it's not just a one-off exercise for a particular problem, but a way of thinking about problems generally. For example, we might be caught off-guard by spikes in volume, as might happen when there is miscommunication between parts of an organization (perhaps the marketing group introduced a special offer that resulted increased demand on our sales systems, but IT was not informed). When a pattern of spikes develops, we definitely want to understand why. The symptoms

are going to be things like backlogs or bottlenecks, but there could be any number of underlying causes that we need to understand. Once we understand these causes, we can brainstorm solutions to address them. These solutions will likely include common-sense actions, like opening up a communication channel with marketing, increasing capacity, or increasing the flexibility of resources so they can be moved around to meet changes in demand.

As noted, several of these solutions are quite commonplace, and are likely to be solutions service desk practitioners are already using. However, these solutions may also leverage Lean tools like workload leveling, one-piece flow, 5S, and mistake-proofing, which are more likely to be unfamiliar to service desk practitioners.

What Makes a Service Desk *Lean*?

Lean operations can be accomplished through practice with the methods, tools, and techniques derived from the Lean Toolbox, but it also means adopting the philosophical orientation we associate with Lean Thinking. Lean Thinking involves the adoption of a problem-solving orientation combined with practices for continuous improvement—solving one problem, then another, then another, and so on, with a "practice makes perfect" attitude.

We define a Lean service desk operation as one in which volume, variety, and process variation are managed, and in which individual workflows are optimized for efficiency. That's a very simple definition, and while it suggests a high bar for qualification, we believe that consistently applied and dedicated efforts to achieve these objectives are sufficient to warrant the label. In Lean practice, perfection is the goal, but getting there is where the learning takes place, and it is accumulated learning that distinguishes Lean operations from others.

For those readers who would like to learn more about the concepts (and benefits) of Lean Thinking and the tools mentioned in this article, we encourage you take a look at our Lean service desk blog on **www.HDIConnect.com**.

	SYMPTOMS	POSSIBLE CAUSES	POSSIBLE SOLUTIONS
VOLUME	• Unforeseen, unmanaged volume • Experienced as rising backlogs	• Often attributed to insufficient capacity or resources, but the problem may be process-related • Unexpected changes in demand could be statistical variation, or may have specific underlying causes	• Root cause analysis of all unanticipated changes in volume and types of requests (may be a variety or standardization issue and not specifically about volume) • Identify drivers of demand and manage capacity and resources accordingly • Increase flexibility of resources (e.g., through multiskilled employees and job sharing) so that resources can go to where the work is • On-demand trend data may reveal patterns that can be anticipated • Workload leveling, a Lean tool for smoothing out the mix of volume and variety (requires a detailed understanding of underlying dynamics)
VARIETY	• Too much unexpected variety • Lots of exception handling and associated delays	• Insufficient filtering of requests on the input side (e.g., in the extreme, a single queue for any and all requests) • Lack of understanding of customer needs ("We don't know what they'll ask for!") • Insufficient capacity utilization planning • Resources unskilled or trained on standard process, not in managing variety • System too structured for standard processing	• Root cause analysis of all unnecessary variety • Use of categorization, routing, and support tiers • Flexible capacity • Increase flexibility of resources through multiskilled employees • Batching and one-piece flow, Lean tools that help to identify the types of things that can be handled altogether and/or all in the same way (as a batch), and other things which can be handled one at a time, both in very streamlined workflows (requires efficient underlying processes and fine-tuned categorization)
VARIATION	• Too much unnecessary variation in procedures • Experienced as rising defects	• Tribal knowledge prevails (nothing is documented) • Natural drift in procedures – people do it "their" way • Actual practice is different from documented process • Configuration drift (e.g., system or service baselines are not stable) • Configurations are not managed • Purposeful neglect or resistance to standard procedures • Lack of skills or training	• Root cause analysis of all unnecessary variation • Process flow diagrams • Standardization of procedures • Flexible capacity • 5S and mistake-proofing, Lean tools that encourage focus on procedures, either through a general program for addressing team-based work (sort, straighten, shine, standardize, sustain), or through mistake-proofing specific procedures

Use the 3V Model as a conceptual tool to help characterize and understand operational problems.

•

Rather than thinking of single solutions to problems, consider the full range of possible solutions based on a deep understanding of problems derived through root cause analysis.

•

Root cause analysis is more than just a tool—it's a problem-solving orientation that's more like scientific inquiry.

•

Borrow from the Lean Toolbox and practice using the tools.

•

Learn about Lean Thinking!

ABOUT THE AUTHORS

Rebecca Duray is a professor in the College of Business at the University of Colorado at Colorado Springs. Rebecca received her PhD from The Ohio State University and her MBA from Case Western Reserve University. Prior to earning her PhD, Rebecca was a management consultant at PricewaterhouseCoopers and A.T. Kearney, among others. Her research interests focus on the strategic use of operations, process improvement, and Lean information systems.

Howard Williams is an IT service management consultant in Microsoft's Services Consulting for IT Operations practice. He is an ITIL Expert and has an MBA in operations management from the University of Colorado at Colorado Springs.

Rebecca and Howard are coauthors of *Making IT Lean: Applying Lean Practices to the Work of IT* (2012).
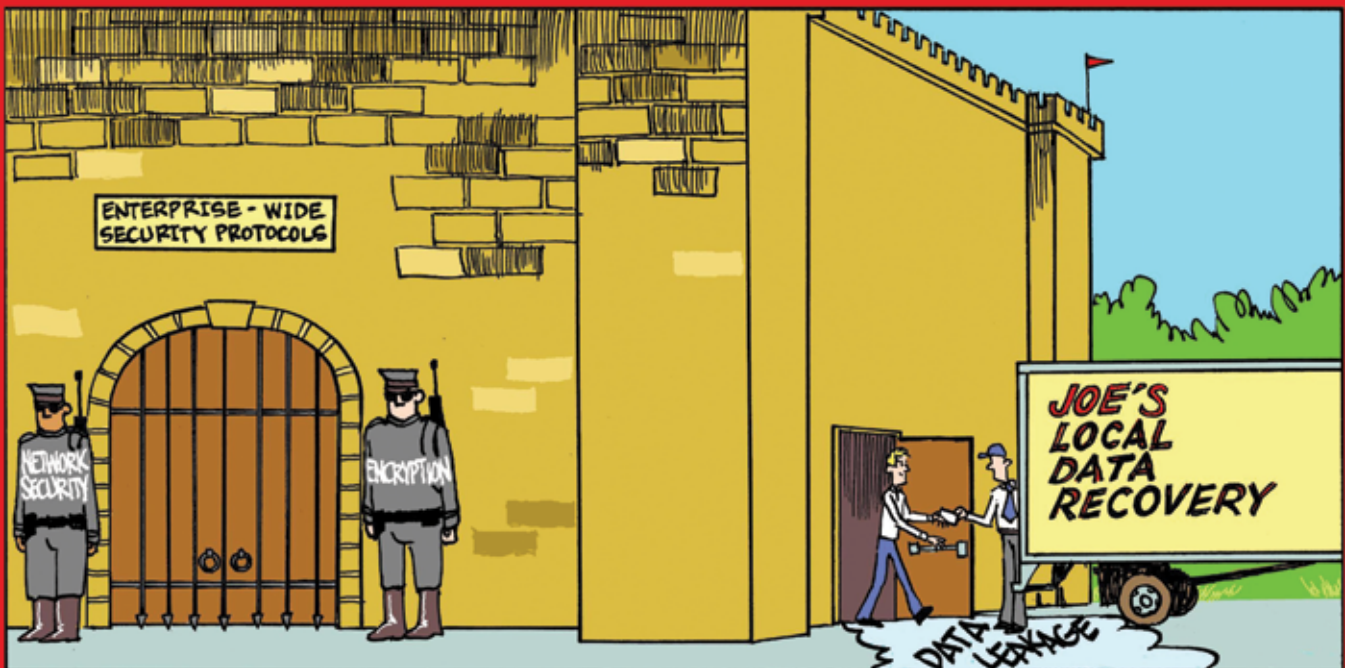
ask the EXPERT

by Roy Atkinson

Some months, I receive a lot of questions on similar (or the exact same) topics; other months—as the saying goes—not so much. Recently, I've received a number of questions that speak to the efforts support center leaders are making to improve, to be accurate, and to work cooperatively with other internal groups.

Q: I have an unusual request from the CIO of one of our clients, who is requesting data regarding what is considered an acceptable number of outages in a year. Do you have any industry standards on the acceptable number of outages for tools, data centers, etc.?

a: There is no single, simple answer to this question. First, there is the question of what is "acceptable" maintenance time. Duration is important, but even more so is *when the maintenance outages occur*. There's no benefit to having 99.99% uptime if that .01% outage happens at a time when a critical business operation demands the service. There's also huge variation in what might be considered "acceptable"—a small retail operation will have different standards than a medical center or an air traffic control system. In essence,

"customers don't care how much downtime you have as long as the service is available every time they need it." Each organization must decide for itself what maintenance windows it can accept and when they should occur. There may also be a point of diminishing returns: 99.96% may be attainable but barely acceptable, while 99.999% may be preferable but so expensive (e.g., redundant systems, alternate networks) that it is not practicable. Bear in mind that 99% uptime allows for 3.65 days of downtime in a year, while 99.999% uptime only allows for *five minutes* a year.

Your question did not specify whether your client is interested in planned outages or unplanned outages, so a word about the latter. Again, each organization must establish its own set of acceptable and unacceptable outage parameters, but, in general, unplanned outages should be kept as close to zero as the organization is willing to pay for. There's an excellent discussion of this question over at **IBM**, and another from **Brad Feld**.

Q: I have a service desk staffed with nine full-time associates and two temporary associates. I'm looking to bring

on two to four more temp associates, but I'm having a difficult time finding qualified candidates (the two temps I already have are also not at the level I would like them to be). My director has suggested I look into augmented staffing. What's the difference between augmented staffing and temporary staffing? Is there a benefit to one over the other?

A: At first glance, there seems to be little difference between augmented staffing and temporary staffing; however, there may be significant differences in practice. Although you would expect that a temporary staffing agency would have done at least preliminary vetting, you'll obviously need to go through the interview processes for each individual. Companies that provide services which augment your service desk are generally providing the same type of support that you do, and they will spell out exactly what types of calls and contacts they can handle for you. For example, let's say your organization rolls out Office 2010, and you know you're going to get a lot of how-to calls. If you engage a company that provides staff augmentation, you may have them handle all of the how-to calls, or the overflow (depending on what you want). Their desk will essentially become part of your desk for the period of the engagement. You will, of course, want any firm to provide you with a list of services (what they do and what they don't do), references, and a demo. Make sure they fit your needs as exactly as possible before entering into a contract. To get your search started, you'll find listings of staffing firms and managed services firms in the **HDI Buyer's Guide**.

Q: I've been using a structured ticket and call audit system with key checkpoints on a formulated spreadsheet. My level 2 technicians are doing the audits because I have too much on my plate as the sole manager for both level 1 and level 2. The problem is, the audits are near perfect, so there's not much to coach on. I'm considering moving away from the structured scoring process and doing something different. Any advice?

A: First of all, it sounds like your people are doing excellent work, both at level 1 and level 2. I don't know if you're familiar with Toastmasters, but they have a series of rules about evaluating speeches. First of all, the evaluation must be positive; speakers need to be made to feel successful. Second, there needs to be room for improvement; no one is perfect. It sounds like your level 2 folks are good at the first part, but need some work on the second.

You have a couple of options. One is to raise the bar: make the audit points more difficult. If you go this route, it's important to be very open about it: "You guys are so good that we're raising the bar..." Perhaps there should be a small celebration attached to that, and one after the first round of revised audits. The second option is simply to have a conversation with the technicians who are doing the audits and say, "Everyone has room to improve, but they won't know it unless we can tell them and help them get there." Then maybe they'll feel better about being "tough graders" when they do the audits.

As an HDI member, you have access to the **HDI Support Center Standard**, and that may help you set the bar for your audits. I also recommend completing the **self-evaluation**, perhaps with your level 2 technicians, so you can begin to track your progress.

Q: I'm looking for the best practice or standard for the number of times the phone rings before it triggers a RONA ("redirect on no answer"). We have separate settings for our two call centers: one location is set to three rings, the other to six. What is the standard (or what should it be)?

A: Do you know why the setting is different between your two locations? Do the same people call both locations? Is there a difference in the way the two are staffed? What happens if the location that is set to six rings is set to three (which seems much more common)? Are calls redirected too often? I don't believe there's a best practice that specifies a number of rings, but a reasonable best practice would be to set it as low as possible (so as not to keep customers waiting) without increasing the frequency of call redirects. In that case, you—or whoever is responsible—can set it upward one ring at a time, gauging the effect on customers/users with each increase. When you reach an optimal level, stop.

ABOUT THE AUTHOR

Roy Atkinson is HDI's senior writer/analyst. He is a certified HDI Support Center Manager and a veteran of both small business and enterprise consulting, service, and support. In addition, he has both frontline and management experience. Roy was a member of the conference faculty for the HDI 2013 Conference & Expo and is known for his social media presence, especially on the topic of customer service. He also serves as the chapter advisor for the HDI Northern New England local chapter.

Playing for Keeps: Finding Service Maturity with Total Contact Ownership

By Pete McGarahan

When I noticed an increase in our customers' frustration with our ticket-closure process (via survey feedback), it was enough for me to feel it warranted further investigation. So I began with a review of our incident management and request management process flow and ITSM tool to see if I could isolate the failure point. Our tool's detailed, integrated, and automated ITIL processes were nearly flawless in design and execution—but not perfect. Because the processes were designed from the inside out (IT to customer), our definition of "closed" didn't align with our customers' expectations. According to our customers' survey comments, we were closing their tickets before their issues or requests were resolved or fulfilled to their satisfaction.

In following up with some of our customers, it became clear that they expected the service desk or the analyst/technician assigned to their ticket to reach out via phone, email, or instant message as a courtesy *before* closing their ticket. In my follow-up with my analysts and technicians, I asked if anyone had taken responsibility for contacting their customers to make sure the solution had worked and that they were satisfied with the results. Their blank looks answered my question. But this simple act would have resulted in a satisfied customer and a whole lot less aggravation and effort!

The Total Contact Ownership Solution

I proposed that we create accountabilities around delivering status updates and validating customer satisfaction with the resolution/fulfillment before closing the ticket. The service desk would also be accountable for:

- Resolving the issue/request on the first contact, if appropriate
- Collecting all of the required information, per a checklist supplied by assignment/subject matter expert (SME) groups
- Troubleshooting and diagnosing, as directed by assignment/SME groups
- Performing quality ticket documentation, according to defined standards/templates
- Completing the assignment in an accurate and timely

manner, in accordance with the service level agreement (SLA)

- Managing the SLA and providing the customer with status updates

- Working with the responsible assignment groups to make sure they have everything they need to resolve and fulfill the customer's issue or request, in accordance with the SLA

Ideally, the assignment group would have all the information it needed, based on their supplied template or data requirements, to resolve the issue or fulfill the request within the specified SLA times (as defined in the priority matrix). If not, the SME responsible for the resolution and fulfillment could make the decision to contact the customer either to negotiate a completion date based on impact and urgency or to obtain further information that might lead to the ultimate resolution or fulfillment of the customer's issue or request. Either way, the customer's productivity and satisfaction was to be our primary focus. If the service desk or the assignment group (or both) fail to manage this process, then IT as a whole will have failed the business in one of its primary responsibilities: adhering to agreed-upon service level commitments.

In the industry, this practice of validating a customer's satisfaction with a resolution is known as total contact ownership (TCO).

The Supporting Culture: TCO and RACI

In today's rapidly changing business and technology environment, customers want their IT organizations to be accountable. Building a service culture around ownership and accountability should be the top priority for all service leaders.

TCO aligns perfectly with the RACI (responsible, accountable, consulted, and informed) matrix, which provides all stakeholders with a step-by-step picture of who does what and when they should do it. If you implement a RACI matrix, you'll immediately see noticeable and measurable improvements in service quality, efficiency, and customer satisfaction. Quality of work will also improve once you clarify and communicate your team members' roles and responsibilities. By holding team members accountable, measuring their performance, and recognizing consistent and outstanding service, you will create an empowered, engaged, and quality- and customer-driven culture, one that's primed and ready for TCO.

Realized Benefits

The primary reasons for implementing TCO are targeted at "doing it right the first time" versus "doing it over and over again":

- Ensuring a consistent, high level of customer satisfaction (CSAT)

- Improving SLA adherence

- Reducing effort around status updates, management escalations, customer contacts, etc.

Your customers want to know that IT understands the business impact and urgency of their issues and empathizes with them. They don't want to be victims of the dreaded "black hole syndrome," where, after their initial contact fails to yield a resolution, they never hear back from the service desk. This leaves them wondering whether anyone has been assigned their issue, whether the analysts/technicians have the information they need to resolve the issue, or whether the analysts/technicians have the skills and expertise required to resolve the issue at all. They wait to hear back from someone, anyone, just to plan their day and make arrangements to be at least somewhat productive.

The SLA clock should **stop** when a ticket's status is changed to resolved (incidents) and fulfilled (service requests). **Closed** is merely an IT administrative function that officially takes the incident or service request out of the SLA queue. Disciplined adherence to the TCO process positions technical service and support organizations to continuously improve and realize several long-term benefits:

- Reducing support costs by focusing on providing quality resolutions the first time (delivering FCR while minimizing call-backs and reopens)

- Increasing FCR on repetitive issues by having the analyst who opened the ticket preview the resolution field and knowledge base article

- Improving service consistency by including an audit trail (quality assurance/quality review) for every ticket where the customer was contacted before closure

- Improving the problem management process by providing details that enable analysts/technicians to quickly identify root causes and solutions

- Improving the quality of ticket documentation

- Improving service delivery by making it seamless and transparent while building better relationships between the service desk and assignment groups

- Increasing employee engagement, empowerment, and job satisfaction

You Answer It, You Own It

Before you can successfully implement TCO, you will need all stakeholders—especially the service desk and assignment groups—to commit to building relationships with each other and with customers. As discussed earlier, the service desk and assignment groups must keep the customer in mind when they're designing the integrated incident management and request management process TCO requires. To provide a customer-validated resolution and fulfillment, the service desk and all assignment groups must work together seamlessly and transparently on successfully completing all activities/tasks related to the process (per the RACI matrix), ensuring that all relevant information is collected during the first customer contact, setting the customer's expectation, and providing regular status updates.

According to TCO, the first responder to the customer's initial contact is the designated owner of the customer's issue or request until it has been resolved or fulfilled *to the customer's satisfaction*. This means the analyst must:

- Greet the customer in a friendly and professional manner
- Work through the process of gathering the required information
- Troubleshoot and diagnose using remote control (if necessary) or by instant messaging available SMEs
- Document symptoms, error messages, and troubleshooting results in the ticket
- Search the knowledge base
- Validate resolution or fulfillment before closing the ticket OR assign the ticket to the group responsible for handling resolution or fulfillment
- Provide status updates until the issue is resolved to the customer's satisfaction (if unresolved)

But it's not all up to your analysts. For your TCO initiative to be successful, your stakeholders must collaborate, communicate, and cooperate to:

- **Educate and train the technical service and support organization on why TCO and RACI are so important**
  - Create standard support narratives that include the integrated TCO, incident management, request management, RACI-driven activities, and customer service practices
  - Gather all information with the intent to resolve on first contact
  - Assign tickets accurately
  - Minimize customer contacts
  - Provide regular status updates
  - Work towards SLA adherence
  - Verify that the customer is satisfied with the resolution/fulfillment
  - Close tickets upon receiving customer approval OR if the customer doesn't respond in an established timeframe
- **Streamline incident management, request management, and TCO processes**
  - Integrate and automate all workflows into the ITSM tool

- Operationalize Knowledge-Centered Support (KCS) and incorporate UFFA (use it, flag it, fix it, add it) into the incident management process
- Ensure SLA responses and resolution metrics are captured
- Measure assignment accuracy
- Monitor customer contacts for status updates and information gathering

- **Communicate with the customer**
  - Determine how best to communicate with customers throughout the incident and request management processes, especially as relates to assignment, response, resolution, survey, validation, and approval to close

- **Implement new performance metrics**
  - Update analyst and team metrics to include metrics that support TCO

- **Follow up on customer satisfaction**
  - Create a CSAT alert to tell you when you've failed to meet a customer's expectations
  - Review the notes in the ticket and, if possible, listen to the call recording
  - Follow up with the customer for recovery purposes (or for praise)
  - Resolve the customer's issue
  - Share the lessons learned with your analysts/ technicians (e.g., coaching, process, app/ technology, knowledge article, assignment) so the same mistakes aren't made again

· ·

Total contact ownership is a mark of business maturity for technical service and support organizations. It takes the best practices of ITSM and strengthens them with customer service resolve. TCO has always depended on the "one team, customer first" approach, as it requires the assignment groups to work with the service desk to focus on the customer. However, all of the effort you'll put in to TCO, you'll get back in measurable, visible progress toward becoming more business-focused and customer-minded. Remember, we are in the business of servicing the business; without the business, we are out of service. When it comes to our customers, we're playing for keeps.

ABOUT THE AUTHOR

Pete McGarahan, senior IT director at First American Financial Corporation, is a thirty-year veteran of IT and business. He's been blessed with great career opportunities, experiences, and acquaintances, and he enjoys sharing the lessons he's learned in his published writing and his speaking engagements. If you have any questions about TCO, Pete can reached at **pmcgarahan@firstam.com**.
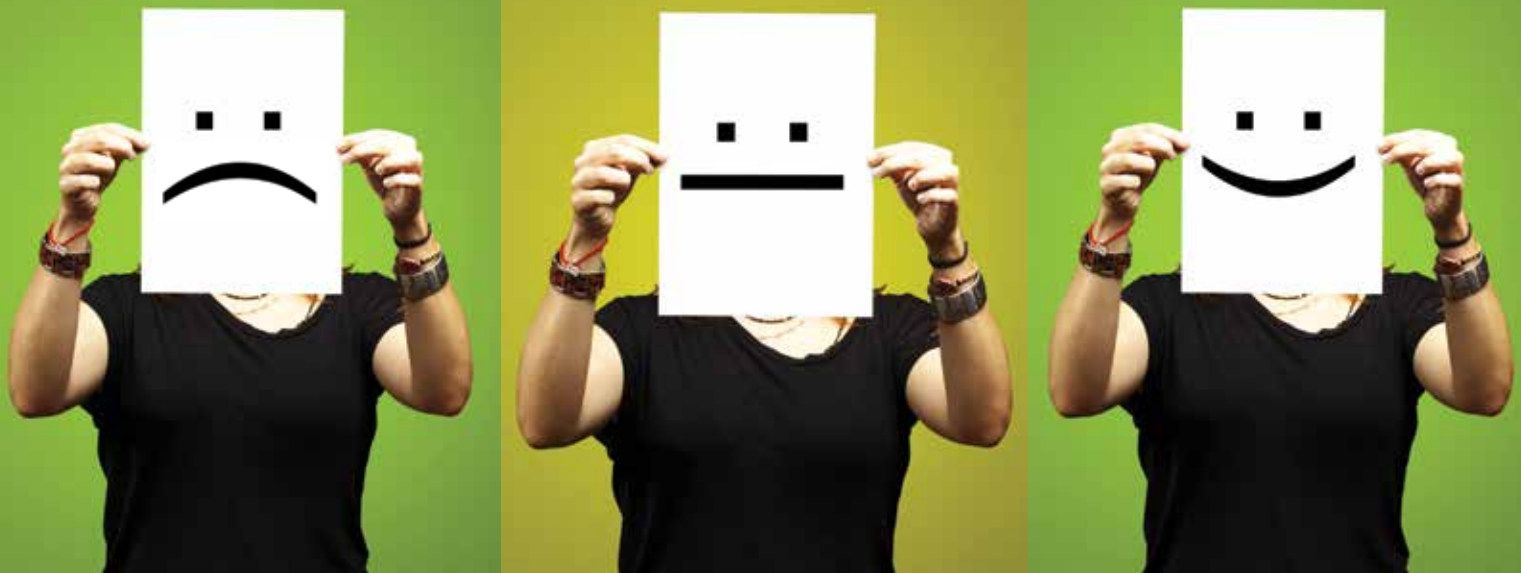
Customer Experience: What Is It and Why Is It Important?
By Roy Atkinson

In the July/August issue, Julie Mohr outlined a strategy for managing the customer experience. In this article, Roy Atkinson applies that strategy to a real-world scenario.

Customer experience drives customer behavior. When we're in the role of customer, we recoil from negative experiences and gravitate toward positive ones. There may be some mitigating factors, such as a much lower price or an exclusive item we can't find anywhere else, but, in general, we don't go back to businesses where we've had a bad experience.

Until fairly recently, many internal support centers have been "the only game in town." While they occasionally measured customer satisfaction, these support centers didn't have to worry much about competition, and neither did IT. Now, with the availability of the cloud, the proliferation of managed services, and the perceived ease of outsourcing, the customer has become much more of a topic of conversation, and—rightfully so—customer experience has come to the fore in almost every organization. If it's too difficult to get the support they need, or if support centers aren't paying attention to what their customers want, how they want it, and when they want it, those customers will take their business elsewhere.

As soon as the idea of providing excellent customer service became a "must-do," the idea of the customer journey and customer experience became areas of study. With Drucker's famous statement in mind—"You can't manage what you can't measure"—managers began seeking ways to capture and measure the customer experience, which, owing to its subjective nature, had long been considered difficult to quantify. Thus, customer journey map and customer experience map were born. The *customer journey map* displays the paths a customer may follow in doing business with you, while the customer experience map shows the customer's perception of each (or a selected) encounter. The purpose of a customer experience map, then, is to visually represent the emotional reactions of customers throughout an interaction (or series of interactions) with a business.

Think of an interaction between an end user/customer and the support center. Now think about how the multiple component interactions—often called *moments of truth*—that comprise that transaction look from the customer perspective. Let's consider an example.

On a Monday morning, Sheila, an employee of our company (i.e., an end user/customer), finds that she can't open an application she needs to use to produce a report due that afternoon. After trying some "quick fixes," such as restarting her laptop and checking with coworkers (who, as it happens, are unaffected), Sheila calls the support center for help. What we need to bear in mind is that she's already had an emotional reaction: the tool doesn't work, and every minute lost is diminishing her ability to get her report in on time. Every bit of effort it takes to get her issue resolved merely increases her anxiety. She listens to a long outgoing announcement on the IVR and finally gets to the prompt she needs. The voice

recognition system makes her repeat the name of the application she needs help with four times, and then she's put into a queue for the group that handles the type of issue she is calling about. And then she waits, listening to a repeated message that tells her "Your call is important to us."

Sheila is frustrated.

Harried by the usual rush of Monday mornings, the support center analyst who (after four minutes) fields the call basically wants to be done with this ticket as soon as possible, especially since his manager has been concerned about his call duration lately. He readies the standard opening statement: "Support center, this is Jim. Are you calling about a new or existing issue?" However, luckily, Jim can see who's calling and he doesn't have to ask. He's already searching on Sheila's name in the case management tool to see if there are any open tickets. There aren't, and Sheila confirms this. "I can't seem to run this reporting program, and I need to get my product report in *today* for the end of the quarter," she says.

Jim runs through a series of questions, beginning with "Have you restarted your computer?" which she has. "So much better than 'Restart your computer now,'" Sheila thinks. Jim is doing his job. His demeanor is businesslike, and he seems to be working quickly. He's picked up on Sheila's urgency. Jim asks if he can remote into Sheila's computer to perform some tasks, and she agrees. Jim goes "under the hood" and reinstalls the ODBC drivers and resets the connection for the application. The application opens.

Sheila is relieved and pleased; she can now produce the required report. She thanks Jim and he ends the call, along with his remote connection.

Within a few moments, however, Sheila realizes that her personal preferences for this application are no longer there. All the shortcuts that she has created for herself are gone.

She has a decision to make: plow ahead and rethink how she gets the information for her report, or call support again and see what they can do. She gets a cup of coffee from the kitchen area near her office and makes a decision. She dials the number for support. Just then, she sees an email from support telling her that her ticket is closed and asking her to take a customer survey. On hold again, the IVR system tells Sheila how important her call is. Meanwhile, Sheila is looking through the menus for the application, trying to remember how she set it all up nearly two years ago.

When, after six minutes, she gets through to a person, it's not Jim. Sheila explains the story so far, and the new analyst, Tammy, is able to quickly find Sheila's just-closed ticket. Since the ticket management tool doesn't allow reopens, she creates a new ticket and copies information from the closed one. Tammy scans the documentation about this application in the knowledge base, but she doesn't see anything about preserving settings. It looks like Jim went "by the book" and restored Sheila's function, but there's nothing much Tammy can do to help. She offers to research ways to restore settings, expresses her empathy for Sheila's added work, and apologizes for not being able to do more.

When we reduce all of this to a transaction (or two, in this case), all we see is a contact and a resolution, then a related ticket and resolution. From Sheila's perspective, however, it's far more than that. Her overall *customer experience* has gone through several peaks and valleys on this particular day, and analyzing those peaks and valleys might help improve the way support operates, point out opportunities for improvement, and pave the way to better service.

If we ask Sheila to rate her experiences throughout (on a 1–10 scale), we can build a rudimentary customer experience map like the one below:
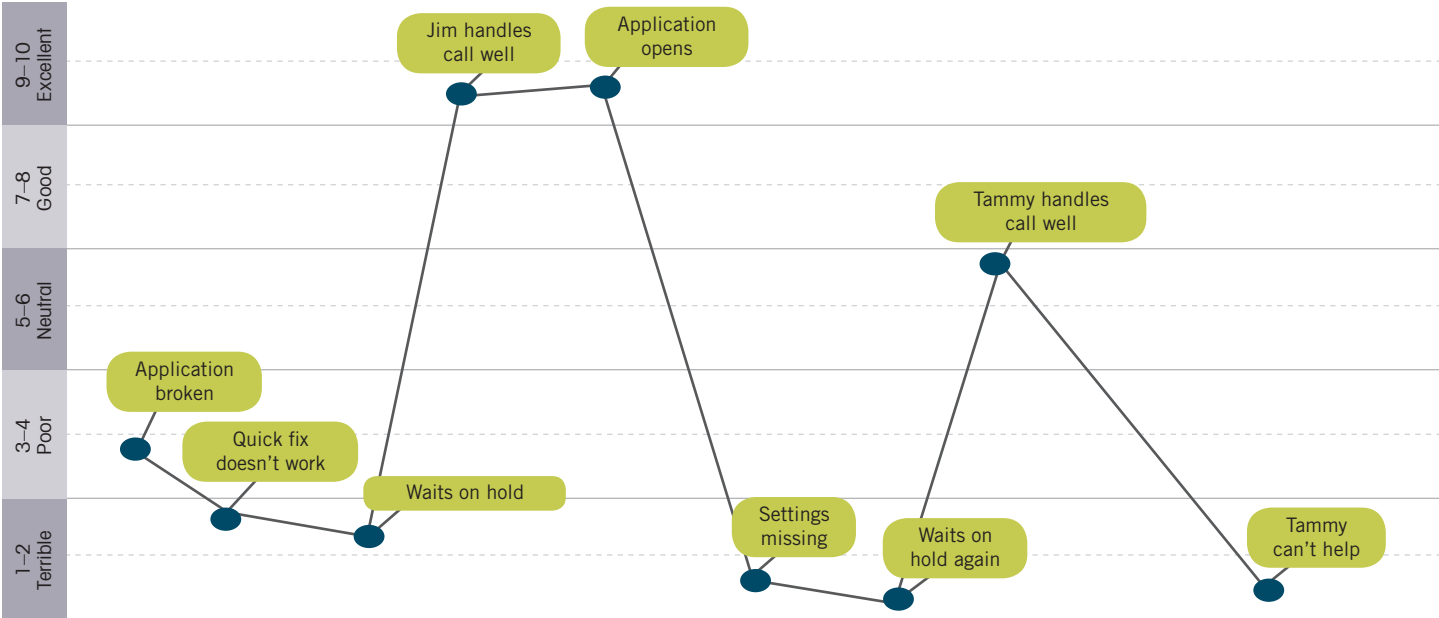
When It's TIME for a New Service Desk Solution

ONE OF THE surest ways to determine the maturity of a support organization is to look at its tools, its processes, and its people. Today, we're going to talk about tools. Think of the first tools, those used to track work. As you look back through the history of your service desk, you can probably remember a time when you had just a few staff, most of whom wore a variety of hats. Considering how work was routed to the support team—drive-bys, snags, etc.—the hustle and bustle of that fledgling organization would have made tracking work intake a difficult proposition.

Enter the next level of tool maturity: home-grown tools built by the support team itself, as the business's support requirements called for a more dedicated support team. These spreadsheets and databases were usually considered to be "interim" tools that could be rapidly converted into mission-critical (and hard-to-maintain) applications. You might be in this position today, struggling when software vendors change versions and suddenly the entire work-intake system needs to be reworked, or when the support analyst that originally built the tool leaves the company, leaving behind little or no documentation for the next person who takes up the maintenance duties. Not to mention how much money you've spent developing and maintaining this internally. Was it really a good use of time? Reporting can be an issue as well, because both IT and business leadership may want to understand the types and volumes of work, and home-grown solutions may not be as flexible for reporting.

As the business grows, support must evolve to keep up with that growth. While it may seem like just yesterday we were all rolling out dedicated incident management systems, you may be finding that it's already time to change that solution. After all, the lifecycle of any solution is a relatively short three to five years.

Whatever your reasons, there are many challenges that arise when implementing a new service desk solution. Search for "service desk solution" or "help desk software" and Google will return literally millions of results as hundreds of solution providers compete for your attention and purchasing power. Some offer very dedicated, specific solutions, while others try to be all things to all people. But what are your "must-have" features? How long should the ideal solution take to implement, and how hard will it be to transition from your current system to the new one? How important is ongoing maintenance, and what will it require? What are the training costs to roll out to your staff? Since the goal is to move to a more stable system, these are all questions you must ask and have answered before making a decision and signing a contract.

SET YOUR BASELINE REQUIREMENTS

Early on, decide whether you need a simple help desk solution or a full-featured service desk tool. There is a significant difference: help desk software simply helps you organize and track incidents, whereas a service desk solution will do much more and allow for future growth. Gather core requirements from IT and the business to determine the key criteria for making the final selection, including these four factors.

1 **Aligned with ITIL best practices.** Even though you may not currently need features like release or configuration management, knowing that the tool has additional ITIL-aligned capabilities will inspire confidence in the tool's ability to meet future needs. Also, ensure that the tool has a solid incident

management system, as incident management is one of the core ITIL practices.

2 **Built-in self-service.** Select a tool that gives your customers the ability to troubleshoot and solve their own problems without the intervention of IT support, a function that will only become more important over time. As the workforce becomes more comfortable with technology, there will be an expectation of self-service, where customers can visit a support portal at any time, from anywhere, and find solutions to their technical questions.

3 **Integrated with remote support and monitoring tools.** Recent surveys have shown that one of the most important technologies for a mature support organization is the ability to support customers remotely, both reactively and proactively. Tight integration with remote support and monitoring tools avoids the need for double or triple handling. Ideally, your service desk should be fully integrated—a one-stop shop. A service desk analyst should be on hand to assist the customer, using the solution's remote support and monitoring tools to resolve the incident, and preferably before it happens. This eliminates calls to the service desk, delights the customer, and at the same time reduces effort—and therefore cost—for the support team.

4 **Easily customizable workflows.** Since few businesses are alike, and the workflow processes of one are different from any others, a service desk solution should be customizable. Determine whether the software is standalone or proprietary, or if APIs are available. If flexible programming interfaces are available, IT or business developers will be able to integrate the service desk into other systems; for example,

rather than staff a dedicated website, developers would could add certain functions to a branded page within IT's website.

ASK THE TOUGH QUESTIONS

The solution provider you select is just as important as the features offered by their software.

1 **Financially viable and stable.** A solution may offer what sounds to be a sweeping set of tools, along with promises of great features and future development. However, if the vendor making the offer has no track record, it could be a recipe for disaster. A service desk solution is a serious investment in a tool that will be in place for a long time. Make sure you are confident the supplier will still be around in a few years.

2 **Partners on proof of concept.** Can the vendor help you with the proof of concept? Will it? Since this is a major (and potentially costly) step, being able to understand not just what features a solution contains but also how they work within your service desk can be very important. Make sure the vendor is willing to give you access to the actual software to test its functionalities. Test that it really will make you more efficient. Also, be sure to gather several references from other businesses (preferably similar organizations). This step will help you understand the difference between what you think you may want in a solution and what is actually necessary for a solution to be successful. By having first-hand experience with it or by seeing how others have implemented the solution, you may be able to determine how well it will fit within your own organization.

3 **Solid industry track record and strong customer support.** Be sure that whichever vendor you select has a solid foundation in the technical service and support industry. Do some

networking and find out how well a particular solution has worked for others and if the supplier has reputable support practices. A great product with poor support quickly leads to frustration.

SERIOUSLY CONSIDER THE CLOUD

Many service desk solutions still rely heavily upon server-client relationships. Some still have dedicated clients that must be run at the analyst level to access information stored in the tool. This can be problematic, as it makes it difficult to keep up with new technologies and often means that the primary infrastructure, such as servers and networks, must be housed on site.

1 **Anytime, anywhere access to support.** First and foremost, the cloud gives the IT support team the ability to use the tool anywhere, on any platform. It gives support professionals the necessary flexibility to be able to access and update incident records on the fly—from their desks, from their customers' desks, or even from a smartphone or tablet. It's no longer necessary to have to stop work while technicians run back to their desks to update a record. Not only is it more efficient, it can also be a great selling point during the hiring process, as technical people like to use the latest technologies.

2 **Contain support and maintenance costs.** Putting the service desk solution in the cloud, on servers that can be accessed by any device that has a web interface, is an effective approach. That's not to say that adopting a cloud solution will be easy, because there are costs associated with establishing new processes and training. However, the return on this investment can be significant. In addition, upgrades will generally be taken of for you, and cloud-based service desk vendors often have much more frequent release cycles.

For small or midsize businesses, the full infrastructure may be too costly, or the organization may lack the talent and resources necessary to set it up and maintain it. A hosted cloud solution may be the answer, allowing IT to leverage the background and experience of a dedicated team that knows the product inside and out. That can often mean the difference between success and failure.

BE SURE YOU CAN MEASURE SUCCESS

Once the solution is in place, the tool must offer a means of measuring the success of the support team with comprehensive, adaptive, and easily created reporting. Performance dashboards should be readily available for multiple levels—management views, analyst views, and customer views. There's a common saying that what is not measured, is not managed, and this applies to a service desk. To be effective, information must flow in two directions: input from the support team and customers, and output in the form of clear and informative dashboards and reports.

MAKE THE DECISION

If your team's existing solution is showing its age and is in need of an upgrade, it's time to consider a new service desk solution. Work with the IT support teams and your customers to build a clear set of requirements. Then select a provider that has an established track record that can meet those requirements with an ITIL-compliant, customizable, cloud-based solution. It will improve everyone's experience—inside and outside of IT support!

Written by Mike Hanson on behalf of Citrix. For more information about selecting a service desk solution, please visit **GoToAssist** *(www.gotoassist.com).*

It's now obvious how Sheila will rate Jim and Tammy: not necessarily according to how Jim and Tammy did their jobs, but more according to where Sheila herself was in the emotional rollercoaster of this incident (i.e., her *perception*). Tammy was professional and friendly, but Sheila already had been treated in a professional and friendly manner by Jim, with less-than-desirable results.

The incident was (apparently) caused by a defect in the ODBC connection; reinstalling the ODBC drivers *did* get the application to open. But what would the rest of Sheila's experience have been like if the documentation for that procedure had included a note about backing up the user's settings first?

In this case, Sheila's *perception* of the interactions wound up being lower after the application was "fixed" than it had been when she discovered that it was broken. In addition to the lost time spent on the incident itself, she now had to spend time restoring her customizations as best she could *and* dealing with the extra time it would take her to accomplish her work without those customizations.

Customer experience isn't something that happens in isolation. It is part of a continuum that includes the applications, the equipment, and all the services we provide to our customers and end users. Only by focusing on the customer and improving the customer experience can we improve our entire suite of services and the way we deliver those services.

ABOUT THE AUTHORS

Roy Atkinson is HDI's senior writer/analyst. He is a certified HDI Support Center Manager and a veteran of both small business and enterprise consulting, service, and support. In addition, he has both frontline and management experience. Roy was a member of the conference faculty for the HDI 2013 Conference & Expo and is known for his social media presence, especially on the topic of customer service. He also serves as the chapter advisor for the HDI Northern New England local chapter.

You Can Do It!
A Framework for Effective Coaching

By Mia Melanson

In the May/June issue, Mia Melanson identified the fundamental skills customer support professionals need to deliver consistent, high-quality service and support. In this article, she explains how effective coaching is one of the keys to truly brilliant performance.

I've coached hundreds of individuals in customer support and in blended sales-service environments, and, as a coach, I've experienced success and failure. Invariably, when coaching is successful, it's because of a human or emotional connection to the team member and the team member's emotional connection and commitment to the intended goal. Real behavioral improvement is always the result of targeted guidance and feedback, based on the team member's progress, his or her specific situation, and the impact on the customer and business.

Based on those criteria, the framework for effective coaching consists of three areas:

- Connecting with the team member on a human or emotional level (believing, feeling)

- Connecting with the team member on a rational or thinking level (knowing, understanding)

- Connecting the goal to specific behavioral changes or specific tasks, articulated clearly, step by step, with written follow-up

Here's an example: I'm working with a customer support professional—let's call him Chris—who relies heavily on colleagues and the team lead when working with customers to resolve issues. He also escalates calls that could be resolved at the first level. Chris seems to lack confidence in his technical knowledge as well as his knowledge of internal procedures.

The manager in me is rationally assessing the impacts of this situation: increased costs due to unnecessary escalations, lower productivity of other team members due to interruptions for guidance, etc. The coach in me is rationally and emotionally assessing the situation and the individual by asking several questions that will help me prepare for the subsequent coaching session:

- Is lack of training causing this situation?
- Does this team member have the knowledge but lack the confidence to work independently?
- Can the team member use support tools effectively, such as the knowledge base and the service management tool?
- Does the team member interrupt colleagues due to lack of focus or a need to socialize?

You can see that these questions address both the human element (i.e., the individual) and the thinking or knowledge element. In addition to attempting to answer the above questions on my own before meeting with the team member, I use the quick assessment below to decide where to begin. This assessment helps me determine whether the issue is training-related or attitude-related.

Quick Coaching Assessment

To use this model, assess your player on each axis (on a scale of 1–10). For a team member who rates highly (7–10) on both attitude and ability, the environment itself may be preventing good performance. This should tell you that you may need to provide more resources, better ergonomics, etc. For the current example, based on my observations and knowledge, I believe that Chris has a good attitude, but low ability. Therefore, to increase the odds of a successful coaching session, I'll begin by making some training suggestions.

Ability 10	Motivation	Environment
1	Job Fit	Training
	1 **Attitude** 10	

Six Steps to Effective Coaching

Once I've set the direction of the coaching discussion, I will further prepare by reviewing the six-step coaching process.

1. Define and communicate the reason for the coaching session, and get the team member to buy in.
2. Discuss ways to improve or excel. Listen with empathy.
3. Encourage participation by asking open-ended, high-gain questions.
4. Use the team member's suggestions whenever possible.
5. Agree to and document a plan of action (who will do what by when). Both parties should sign off on the agreement.
6. Schedule a follow-up meeting within five to ten days, and make sure the necessary resources are in place.

This process encourages the team member to take ownership for discovering what needs to be improved and how to go about making those improvements. It also prevents the coach from "nagging and swagging" or "preaching and beseeching," neither of which are strategies that work very well.

The coach is responsible for the first three steps. First, establish a meeting time and reserve a private meeting location, such as a conference room or a high-walled office. When you meet, exchange greetings, create a relaxed atmosphere, and then begin the coaching dialogue, which may go something like this:

> Chris, as you know, I review incidents from all of our team members. I've noticed that many of the incidents you handle are being escalated. Some of those incidents could have been resolved by using our knowledge base, or perhaps by asking a few more questions. When we escalate issues, our customers have to wait longer for solutions *[appeals to emotions]* and the cost to the business is higher *[appeals to rationality]*, so I'd like to see you resolve more incidents on your own before escalating them.

Notice that I've focused on one specific concern for this coaching session. The other concerns can be addressed in future discussions, since you should be having monthly one-on-one coaching sessions (20–30 minutes) with each and every team member anyway.

Getting back to our conversation, after addressing my concerns, I will ask for Chris's feedback. Hopefully, Chris will agree that some improvement can be made. Next, I will ask some open-ended questions, prepared in advance, that address ability, not attitude. You can even use or rephrase some of the following questions:

- How often do you use the knowledge base?
- What do you think would be help you resolve more issues on your own?
- Perhaps we can listen to a few of your calls together to identify some additional probing questions that might help you resolve more issues on your own. Would that be helpful?

Now it's Chris's turn to reflect and respond to your guiding questions. The next three steps shift the conversation toward the team member's responsibilities, one of which is being accountable for the action plan (i.e., for results). Together, Chris and I will formulate an action plan, and at the end of the session, I'll ask Chris to send me an email summarizing the plan and his understanding of the expected results. As his coach, I will continue to provide feedback and resources as necessary.

The Coaching Relationship

As we've already discussed, the coaching relationship exists on three planes: the emotional, the rational, and the dialogical (e.g., feedback and guidance, discussing specific, descriptive goals). Ultimately, coaching is a relationship between the manager/coach and the team member. The team member will opt in or opt out depending on the strength of that relationship. A strong relationship is built on the following elements (based on the work of Jim Selman):

- Partnership and mutuality
- Commitment to producing a result or enacting a vision
- Compassion, sense of humanity, and nonjudgmental acceptance
- Communication (speaking and listening for action)
- Responsiveness to the coach's interpretation
- Honoring the uniqueness of each player, relationship, and situation
- Practice and preparation
- Giving and receiving
- Team sensitivity
- Willingness to go beyond what has already been achieved

This list of required behaviors is easily articulated, but it's hard to achieve. Cooperation and commitment are the keys to success, but each coach must develop his/her own comfort level not only with the ten foundational elements but also with each team member, all while maintaining authority (if you are, in fact, in a position of authority). At the end of the day, there are tasks that must be accomplished, and you have the final word as far as what must be achieved and by whom.

When Coaching Doesn't Work

As I mentioned at the beginning of this article, most of the time coaching is successful. However, when it isn't, you may have to acknowledge that the job is just a poor fit. If you've tried training, motivation, and improving the work environment with no result, then it may be time to transition the team member into another job at your company or to another opportunity elsewhere.

If HR counseling is what's required, be sure to meet with your HR representative and get his or her recommendations. In the event of HR counseling, documentation is very important, so save both hard and soft copies of the action plans generated after each coaching session. Also, be sure to document work samples and your observations, in case the team member eventually needs to be terminated.

Coaching for Change

Coaching is a function of leadership. As a manager, you can encourage and enact change through consistent and caring coaching. Some changes will be small behavioral changes; some will be larger changes, such as team member roles or widespread organizational change. Regardless, effective coaching can help change happen more easily, more quickly, and with less fuss. Ultimately, people decide to improve and change based on emotions, rational thinking, and clear, visionary guidance.

Ben Franklin once said, "Men are best convinced by reasons they themselves discover." As a coach, you can help your team members discover how they can improve and succeed within your team, your organization, and our growing industry.

Good coaching!

ABOUT THE AUTHOR

For the past twenty years, Mia Melanson has provided professional and organizational development programs for customer support centers in entrepreneurial organizations and Fortune 1000 companies. As president of Performance Consulting, Mia gives her clients the tools to reinforce skills development and assess industry standards and metrics, and she's written articles and books on coaching, communication skills, and stress management. Mia's also an HDI Faculty member and an adjunct faculty member at Northeastern University's School of Business.

Flip Your Training:
Classroom Technology for Twenty-First Century Businesses

By Mark Fitzgerald

For generations, our educational system has been based on the idea that the role of the instructor is to stand in the front of a classroom and share knowledge and enlighten students. In a sense, traditional teaching is a form of theater. The teacher plays the role of the performer on the stage, entertaining, informing, and inspiring the student audience.

Instructors have long relied on lectures as a primary method of delivering information (and this is true not only in higher education but also in continuing education, conferences, training, and the like). But, in terms of retention, lecturing alone is ineffective. To really understand the material, we need our students and employees to synthesize and apply the information. This takes discussion, practice, and interaction.

A revolution is taking place in higher education: the lecturer is no longer a solo act. New technology is allowing instructors to flip their classrooms upside down.

In one way or another, all organizations teach. Businesses train new employees on their cultures, technologies, and processes. In IT, training often accompanies a large roll out or new initiative. In fact, many IT departments have a training department or make explicit assignments to teams to conduct IT training. Thus, this educational revolution is poised to affect more than just higher education, and using the classroom as a model can improve results in the business training room.

Collaboration with an Expert

These days, many instructors assign their lectures as their students' primary homework assignments. By its nature, though, a lecture

is a performance. It's not interactive, so why bother having the student and the instructor in the same place at the same time? Why not record it so they student can consume the lecture at a later date? In an age of effortless digital video recording and publication, capturing and distributing a lecture is an easy enough task. Skilled instructors can also enhance recorded lectures with more sophisticated and effective audio and visual aids.

With the introductory, noncollaborative learning out of the way, instructors and students can spend in-person class time on deeper learning: collective discussion, expert demonstration, practicing skills, etc. When students complete assignments on their own, without interaction, demonstration, and feedback, they may be applying and cementing those skills inaccurately and incorrectly. By practicing with the instructor present, students have a better chance of learning the material correctly.

The training room flips when the focus shifts from having the expert present to instruct the learners to having the expert present to interact with them. Discussions help auditory learners, while activities lend themselves to the kinesthetic learning style. Visual learners, meanwhile, benefit from collaborative group work. In the twenty-first century business training room, a variety of factors—teaching methodologies and techniques, technology, room design, etc.—come together to enable experts to reach a more diverse range of learners.

Making It Happen

Flipping a classroom requires instructors and business to make changes to their delivery, the teaching environment, and, often, the technology they use in those environments.

Scripting

Recorded lectures require more preplanning, more confidence, and more coordination. In a recorded environment, a solid script is essential. Any expert can stand in front of a room for an hour and expound on a topic they know well. It's much more difficult to do this in front of a camera, without an audience. No one is there to laugh at their jokes, question unclear explanations, or steer the discussion. A script (or at least an outline) will keep the recording on track.

Production Quality

Production quality is another important consideration. How good is good enough? If the Internet proves anything, it's that poor production quality works some of the time, but not all of the time. A poor-quality recording may be seen as distracting and not credible, but if the message is spot-on, that poor-quality video can be just as powerful as a professional production. Bottom line: focus on the content.

When making a decision on quality, you need to balance the complexity of the production against the projected lifespan of the material. However long you expect your video to be relevant, your audio needs to be clear and your visual aids need to be readable. Also, keep in mind the needs of your audience: accessibility issues, like closed captioning, are far easier to address in the design phase, rather than trying to integrate them after the fact.

There is a wide variety of digital production tools on the market, from high-end professional tools to low-cost, easy-to-use software packages. While you can simply record your lecture in one shot and dispense with audio and video editing entirely, taking the time to learn how to use even the simple editing tools that come with most modern operating systems can greatly improve the quality of your recording. Adding a simple title, a fade-in, or a theme can go a long way toward building credibility and improving a video's watchability. You can also use screen-capture tools to highlight details and video-capture tools to demonstrate concepts.

Interactive Classroom

Once you've designed your lecture and decided how much effort you want to put in to the production of your video, you need to start thinking about what you'll need to facilitate in-class activities and discussions. A flipped training room must be designed and set to facilitate collaboration. Gone are the rows of chairs, desks, and fixed computers. These have been replaced with modular furniture that can be quickly and easily rearranged into, for example, small groups for discussion or learning activities.

By assigning the lecture as homework and delivering it electronically, the screen at front of the room will also become less important. Instead, a more appropriate design could be clusters of smaller screens on which participants can share their screens, increasing the value of small-group collaborative work. The instructor can even use this configuration to share one group's work with the other groups.

Another technology to consider in a flipped room is a feedback response system. This can be a polling device, such as clickers, or a smartphone-accessible webpage. These feedback systems allows training participants to vote, comment, or participate in a group discussion, and it provides the instructor with instant feedback so she can gauge comprehension. The instructor can then correct any mistakes and clear up any misunderstanding before moving on.

One should also consider the impact video can have in the classroom. Many flipped classrooms record group discussions and activities, or bring in participants from other locations. In these situations, camera and microphone placement is very important, as learners viewing the video later on will need to be able to see and hear clearly if the instructor expects them to participate in subsequent discussion.

The decision to put cameras in the classroom will likely influence the decisions made about other classroom technologies. For example, capturing what is written on a whiteboard can be very difficult for a camera. Your organization or institution may instead choose to install a document camera connected to a computer and use the computer's native recording software or a third-party digital production software package.

The Dangers of Flipping Your Training

When flipping your training, there are a number of pitfalls to watch out for. The first is ensuring people understand that completing assignments before class is a requirement. If students or learners haven't listened to the lecture, group activities will be very difficult to complete successfully. Be sure you have a plan for handling scenarios when students or learners haven't completed their assignments.

Time is also an important consideration. People—college students and adult learners—are more distracted these days: smartphones, tablets, chat, other people, and, most importantly, their primary jobs divert people's attention from training. To ensure success, keep your lectures brief. In fact, break them up into short (2–5 minute), topical, self-contained segments. This way, they can consume the lecture in bursts rather than marathon viewings.

Consider where your students or learners might be viewing your videos. Many learners prefer to view training lectures at home, on the train, while exercising, etc. While this may pose more of a challenge for the instructor, giving students and learners this option allows them to select the time and location that's least distracting.

The next item to consider is distribution. Internet sites such as YouTube or Vimeo make for easy distribution, and your students or learners will be able to view the video on wide variety of devices. Be aware that some organizations or institutions might not be comfortable using these consumer sites, so make sure you review the relevant policies before uploading your videos to a social media or video-sharing site.

Finally, remember to treat the lecture as the beginning of the learning process, not the lesson in its entirety. To be able to synthesize and apply new information, students and learners need to model it, discuss it, and practice it. Make sure you follow up your recorded lectures and in-person training activities with written documentation and reminders.

The Benefits to Flipping Your Training

The benefits of flipping your training with these technologies and concepts go beyond the classroom or business training room. You can apply your video production and distribution skills to other projects, such as announcements or process changes, which can go a long way toward improving communication and retentions (as we know, training emails and memos are often skimmed, when they're read at all).

If a staff meeting consists mostly of announcements of upcoming changes, policy and procedure reminders, or general information delivery, prerecording the meeting may make more sense. This will give your staff the freedom to watch at a time that best fits their schedules. And just because it's prerecorded, that doesn't mean it can't serve as bidirectional communication: Couple the video with social media so staff can interact and post comments and questions.

These tools can also be used for troubleshooting and incident support. If a picture is worth a thousand words, imagine the value of video. Capturing the behavior of a malfunctioning application and sharing that video with a vendor can lead to a much quicker resolutions.

. . . .

Lecture-based training is good, but training can be so much better when it's enhanced with demonstrations, activities, and discussion. Presenting the lecture as homework frees up time for collaborative interaction with the instructor or expert, which improves comprehension and retention. Better trained and more engaged employees lead to more efficiency, fewer support calls, and less turnover. It's time to engage our employees in truly collaborative learning experiences.

ABOUT THE AUTHOR

Mark Fitzgerald has a passion for teaching, and working at universities for nearly fifteen years has opened up many opportunities to teach in both formal and informal settings. In addition to managing Boise State University's Help Desk of Distinction, Mark teaches part time in the College of Business and Economics. He has presented several times at HDI conferences, local chapter meetings, and HDI Higher Education Forum meetings. Mark is also a member of the steering committee for the HDI Higher Education Forum and a member of the HDI Desktop Support Advisory Board.

Workforce Management:
Underutilized Metrics for Success By Fancy Mills

Do you ever lay awake at night wondering, "Billy's my star performer, but what if he doesn't come in on Monday (again)? Am I going to have enough staff? If I'm short-staffed, how will I cover the workload, projects, and contact volumes?" In my capacity as an instructor for the HDI Support Center Manager course, I'm often asked what to do about analysts who are "star performers"…when they show up. That's a million-dollar question. But what's the right answer?

Before answering, I ask my students to consider two questions:

1. How are you measuring analyst performance?
2. What makes an analyst a star performer?

Responses vary from "You know, I don't really know" to specific metrics used to measure performance consistently. My answer? If Billy (or any other analyst) can't show up for work (attendance) and be on time for work (adherence) and logged in to work (available) per documented guidelines, then he really isn't a star performer.

If you've got star performers who aren't performing in key areas, then you may be overlooking a big piece of the puzzle!

When building an analyst-level balanced scorecard, focus on those measures that are within the control of the analyst and have the greatest effect on the overall success of the support center. So what can analysts control? Let's take a look at the Three As:

- **Attendance:** Analysts must show up for work.

- **Adherence:** Analysts must arrive to work on time as scheduled and complete scheduled activities throughout the day (i.e., meetings, training, coaching, etc.).

- **Availability:** Analysts must be logged in and available to accept work, and they must track the amount of time they spend working.

These and other metrics, like occupancy and shrinkage, fall under the heading of workforce management. When analysts fail in any of these areas, it makes it very difficult for the support center to operate efficiently. So let's break down the elements of workforce management and look at these metrics individually.

Workforce Management, Defined

The objective of workforce management is to determine the resource requirements—staffing and scheduling—necessary to meet demand. *Staffing* focuses on determining the number of people needed by the business to meet service level targets, while *scheduling* refers to the specific job assignments (including tasks and time frames) people are required to complete to meet service level targets. These targets include average speed to answer, abandonment rates, and first contact resolution, as well as any other targets the business or its customers require.

The goals of workforce management include aligning resources with the needs of the business, properly forecasting requirements for the business's current and projected needs, and consistently adjusting staffing and scheduling requirements to meet service level targets.

Key Workforce Management Metrics

Individual analyst behavior affects the overall performance of the support center. Understanding these workforce management metrics is one of the keys to ensuring that your support center is able to fulfill its current and forecasted staffing needs and, therefore, meet its service level targets.

Attendance

It goes without saying that attendance is an essential job requirement for every analyst. After all, they have complete control over whether or not they show up for work. Working with human resources, support centers must establish strict attendance policies and document them in their standard operating procedures. As part of the onboarding or new-hire process, each analyst should be required to review and sign this policy.

Attendance is a component of shrinkage and should be closely monitored. This means tracking unscheduled time away or absences from work—defined as time away from a scheduled shift due to absences, late arrivals, and early departures—which, in turn, can be tracked separately from or together with adherence. However you track it, it's important to have a policy that consistently tracks attendance and calculates how much time is lost due to attendance and adherence issues. The sample attendance and adherence policy below tracks occurrences by the minute and then calculates the points to identify the coaching action the analyst's manager needs to take.

Total Points	Coaching Action
3–5 points	Coaching
7 points	PIP notice
9 points	Written warning
11 points	Final written warning
12 points	Termination

5–30 minutes = ½ point | 31–120 minutes = 1 point | 121 minutes to 1 full scheduled shift missed = 2 points

Adherence

Adherence (sometimes called compliance) is a metric used to define what percentage of the time and at what rate analysts are complying with or adhering to their schedules. Arriving to work on time and attending scheduled activities throughout the day (i.e., meetings, training, coaching, etc.) are all part of tracking adherence. Let's consider the following sample calculation.

Scheduled	
Shift	7:30 a.m. – 3:30 p.m. (8.5 hours or 540 minutes)
Breaks	9:00 – 9:15 a.m. 2:00 – 2:15 p.m.
Lunch	11:30 a.m. – 12:00 p.m.
Actual	
Shift begins	7:10 a.m. (10 minutes late)
First break	9:15 – 9:30 a.m. (15 minutes late)
Lunch	11:30 a.m. – 12:03 p.m. (3 minutes late)
Second break	2:00 – 2:17 p.m. (2 minutes late)
Logged into unknown auxiliary code	2:17 – 2:27 p.m. (10 minutes)
Shift ends	2:27 p.m. (3 minutes early)
TOTAL = 43 minutes out of adherence	

What impact do these forty-three minutes have on the schedule, the team, the support center, and the business overall? Lost adherence time can lead to lost customers via abandoned contacts, higher average speed of answer, lower first contact resolution, lower customer satisfaction, lower team morale, and lower analyst satisfaction because the analysts that do show up for work and on time have to make up for the analysts that don't come to work or show up on time. The effects can be dramatic, so support centers must set targets or rates of acceptable adherence (e.g., 5% adherence, meaning analysts can be no more than 5% out of adherence for a specific time frame).

Availability

Availability is a measure of the amount of time an analyst is logged in to the system and "available" to handle incidents and service requests. If an analyst is absent, he obviously can't be available, and if an analyst has adherence issues, this also negatively affects availability.

Occupancy

Occupancy is the measure of how much time an analyst is actually handling customers via whichever service delivery channels the support center is using (phone, walk-up, email, chat, etc.). If an analyst isn't in attendance and isn't logged in (available), then she isn't occupied.

Workforce Management Self-Assessment

Attendance
- Does your center have a documented attendance policy? If yes, has each analyst signed off on the policy?
- How are you tracking attendance? Points? Hours?
- What are the consequences for nonadherence?
- What reward polices do you have in place?
- Does HR support your attendance policy?

Availability
- Has your support center set availability targets?
- Are your analysts using auxiliary codes to track their time? Are they using them correctly?
- Do you have ring, no answer, or requeue issues? (This is when analysts are logged in as available, but they aren't accepting contacts.)
- What is the biggest barrier or challenge to increasing available time?

Adherence
- Has your support center set adherence targets?
- What is your policy or target?
- How are you tracking adherence?
- Do you have the tools to track adherence (e.g., tracking via auxiliary codes or a workforce management system)?
- What are the consequences for nonadherence?
- How do you foster adherence without encouraging a "Big Brother" mentality?

Occupancy
- How can you increase occupancy?
- What are the risks? (Hint: Think of the Law of Diminishing Returns—more analysts does not mean higher occupancy.)
- What is the optimal level of occupancy for your center?
- If you add staff, will that increase or decrease occupancy?

What other metrics should support centers track? Share your workforce management metrics on HDIConnect.com.

Strategies for Reducing Shrinkage

Focus on accurately calculating shrinkage. Do you have a process or do you need to invest in a tool?

• • •

Educate your supervisors, team leads, and managers on the topic. Focus on calculating, monitoring, and managing.

• • •

Improve your shrinkage forecasting. Again, do you need to invest in a tool?

• • •

Focus on proactive scheduling (e.g., meetings, training, breaks, lunches, coaching, projects)

• • •

Look for shrinkage patterns.

• • •

Develop adherence policies.

• • •

Monitor and manage analysts via the policies documented in your SOPs.

Shrinkage

Shrinkage is defined as planned and unplanned paid time when analysts are unavailable to handle contacts. Shrinkage must be calculated and factored into workload forecasts to determine the accurate number of staff required to meet demands; inaccurate shrinkage calculations can have a dramatic effect on your perception of the resources your support center needs. But what exactly is shrinkage? *Planned shrinkage* includes such things as breaks, training, coaching, meetings, projects, administrative tasks, holidays, vacations, PTO (paid time off), company events, jury duty, FMLA (unpaid), and disability (unpaid). *Unplanned shrinkage,* on the other hand, includes unscheduled absences, adherence, "goof-off" time, technical issues, fire drills and other threats, and any other unplanned time away.

Shrinkage is a very serious metric. I recently worked with a support center whose shrinkage rate was around 45 percent, much of that unplanned. The director came to me and said, "I can't go to upper management and ask for more staff or resources when I am not appropriately using the resources I have." We took the following steps to improve the support center's shrinkage rate.

1. ***Conduct supervisor and team lead training.*** This training focused on attendance, adherence, and availability.

Supervisors and team leads learned how individual analyst behavior could affect the entire center, and they learned how to calculate shrinkage and manage the key areas that lead to shrinkage

2. ***Define, develop, document, and implement standard operating procedures.*** The analyst-level SOPs included attendance, adherence, and availability guidelines. We defined auxiliary codes and each analyst was trained on how and when to utilize them. Finally, after discovering that more than 50 percent of calls were being placed on hold, we developed hold and escalation procedures.

3. ***Calculate analyst shrinkage.*** We calculated shrinkage at the analyst level using ACD reports that provided details on log-in/log-out time and auxiliary code usage. This was used to identify the biggest offenders and jump-start the coaching and corrective action process.

4. ***Calculate support center shrinkage.*** We then calculated shrinkage for the support center as a whole to determine how shrinkage was affecting forecasting and overall efficiency. We discovered that team meetings were running too long *and* being held during peak times, analysts were being pulled off during peak times to work on projects, hold times were too long, and analysts were escalating issues they could have solved themselves.

· ·

Focusing on these specific workforce management metrics—attendance, availability, adherence, occupancy, and shrinkage—can have immediate benefits, including reducing negative shrinkage and increasing adherence and attendance. It will also enable support center management to make accurate forecasts and use their resources more wisely. Only by balancing attendance, adherence, availability, occupancy, and shrinkage with other key performance indicators and metrics can support center leaders accurately determine who their star performers are *and* sleep better at night.

ABOUT THE AUTHOR

Fancy Mills has more than ten years of experience in classroom training, consulting, and recruiting, specializing in the technical support and call center industry. As a member of the HDI Faculty, she has helped certify more than 20,000 support professionals, managers, directors, and corporate trainers. In addition, she has facilitated courses in presentation, communication, and time management, and she's presented at industry conferences and events.

Exciting Things Are Happening with HDI Membership!

HDI Is Proud to Present the New Membership Model!

LEADERSHIP CONNECTION MEMBERSHIP *(formerly the HDI Forum membership): $4,500 – $6,500*
A top-of-the-line membership that brings an elite group of senior-level professionals together to meet face to face multiple times per year. (Contact HDI for details.)

TEAM PACKAGE MEMBERSHIP
(formerly Platinum Plus): $1,995
A value-packed membership experience exclusively designed for you and your team, offering the most bang for your budget!

LOCAL CHAPTER MEMBERSHIP
(formerly Bronze): $75
A place to find out who's who in the local support community, giving you access to local chapter meetings and face-to-face opportunities with your peers.

PROFESSIONAL PLUS MEMBERSHIP
(formerly Platinum): $795
Join at the Professional Plus level and your workplace can reap some of the rewards of HDI membership!

PROFESSIONAL MEMBERSHIP
(formerly Gold): $495
Get all the benefits of the Resources level and grow your career with access to the ultimate professional development library.

STUDENT MEMBERSHIP
$35
An outstanding value for actively enrolled students looking to expand their industry involvement and get a jump-start on their careers.

RESOURCES MEMBERSHIP
(formerly Silver): $165
Gain access to all of the latest industry resources online and attend local chapter meetings to meet your peers.

Visit www.ThinkHDI.com/HDIMembership today to learn more about the new membership model!

FUSION 13
GRADUATE TO BETTER SERVICE MANAGEMENT

OCTOBER 20-23, 2013

NASHVILLE TENNESSEE

YOUR NEXT SPRING BREAK IS ON US!

Are you ready to vacation in Cancún? Waikiki? South Beach?

Wherever you've been daydreaming about, FUSION 13 can take you there. We'll fly you and guest to your dream spot, all expenses paid— **up to a $5,000 value!**

To win the Spring Break of your dreams, join us in Nashville for FUSION 13 (October 20–23)!

To view the contest rules and regulations, visit www.SMFUSION13.com/MySpringBreak.

Pre-Conference Workshops

Don't miss an opportunity to expand your educational experience:

Pre-1: HDI Support Center Director
Pre-2: HDI Support Center Manager
Pre-3: HDI Desktop Support Manager
Pre-4: HDI Knowledge Management Foundations: KCS℠ Principles
Pre-5: COBIT 5 Foundation
Pre-6: Kepner-Tregoe Foundation
Pre-7: Service Strategy: Between the Pages
Pre-8: Survey Design Studio
Pre-9: Grab@Pizza: An IT/Business Alignment Case Study
Pre-10: Don't Geek IT, Speak IT
Pre-11: The Seven Steps to ITSM Goodness

4 Reasons to Attend FUSION 13

1. **Learning.** Relevant topics, quality sessions, and outstanding keynote addresses make FUSION 13 the event for service management professionals.
2. **Networking.** Networking is one of the most popular reasons why people attend conferences—and the networking opportunities at FUSION 13 can't be beat!
3. **Resources.** Between the FUSION 13 app, downloadable handouts, and expert speakers, you'll have plenty to dive into!
4. **Sharing.** Maximize your conference ROI by sharing the knowledge you gain at FUSION 13 with your team.

KEYNOTE SPEAKERS

Mike Walsh
World Next

Josh Linkner
Unleash Your Creativity: Seven Steps to a Creative Culture

Bill Stainton
It's Showtime: The Five Best Decisions the Beatles Ever Made

Cindy Solomon
The New Leadership Challenge

Larry Winget
The Cold, Hard, Ugly Truth About Success

1 2 3 4 5 FREE

3 Ways to Register:

1 www.SMFUSION13.com

2 866.827.5001

3 Support@SMFUSION13.com

produced by

*it*SMF USA
CONNECT. LEARN. GROW.

HDI.

Group Discount
Did you know that you can bring your whole team to FUSION 13, and save? Yes, that's right. Bring five team members and the sixth is free!

Rewards and Recognition: Reestablishing the Connection

By Phil Gerbyshak

Do you feel you reward and/or recognize your team frequently enough? Do you feel you are rewarded and recognized enough?

For most people, there's a big disconnect. So what can we do to reestablish the disconnection?

One big reason is that we don't know how often people want to be recognized (or if they want to be recognized at all), what they want as a reward, and in what other ways they might like to be recognized or rewarded. We worry about rewarding and recognizing people too frequently, but at the same time we don't put rewards and recognition on our calendars. Another challenge

is that we feel we can't afford to reward and recognize people in the ways we want to.

Let's break down some of these myths and create a rewards-and-recognition program that works. First, three assumptions:

1. Your team members are paid a fair wage.
2. You (or someone on the leadership/executive team) sees your team in action.
3. You care about your team.

As long as these three things are true, you *can* make rewards and recognition work for your organization and it doesn't need to cost a lot.

Step 1: The rewards and recognition must be meaningful—and filled with meaning.

At the end of Dan Wilson's term as the HDI Member Advisory Board chair, Sophie Klossner, then the director of membership, gave him a rock. It was just a rock, but it was one of the best awards Dan ever received; it's still on his desk at home, and he looks at it every day.

How can a rock be a meaningful reward for a job well done? Simple: You pour meaning into the giving of the rock.

During her presentation, Sophie shared some of the great things Dan had done for the HDI local chapter officer community and connected that work to the success of the organization as a whole. Dan, she said, was the rock of our foundation. By the time she was done, there wasn't a dry eye in the house. Dan even cried a little—and Dan *never* cries.

Meaningful rewards and recognition cost you nothing, but they can mean everything to those you serve as a manager.

> Meaningful
> Unique
> Specific
> Timely

Step 2: The reward and recognition must be unique to the recipient.

When I was a manager, I started a brand-new rewards and recognition program for my team. I gave out one award each month, for analyst of the month, and each winner got a gift card for coffee. I thought I was doing it right, because I love coffee—a lot!

As it turned out, my team didn't share my enthusiasm for coffee: only one other person on my team even drank coffee! My mistake was assuming that the reward *I* wanted would be the reward *they* wanted. I was wrong, but there was a simple solution: give the winner a gift card to wherever they wanted (grocery store, gas station, Amazon.com, etc.).

Tailoring the reward to the recipient costs you no more money or effort than you're already spending. Just be sure to take the time to find out what your team members really want.

Step 3: Rewards and recognition must be specific to the recipient.

A C-level executive I used to work with would take ninety minutes each week to walk around the IT department and say, "Thanks for all you do. You're doing a good job. Keep it up." Now, my team (and the rest of the IT department) knew he had no idea what they did, how they did what they did, or even how long they'd been part of the team. He had the best intentions, but the execution was poor, and it was demoralizing for many on my team.

The solution was so simple: We scheduled multiple shorter visits where we would prep the executive with praise points for each member of a specific team or project. We saw the executive more often and people actually looked forward to talking to him, instead of running and hiding in the bathroom or worrying he was coming to talk about layoffs or other bad news.

Specific praise for or about someone's unique contribution costs you nothing, but it means a lot to those on the receiving end.

Step 4: Rewards and recognition should be timely.

Most companies recognize their employees annually, meaning they might be recognized in December for work they did in March or April. But most of us can't remember what we did six days ago, let alone six months ago. Why do the rewards and recognition come so long after the work is done?

Again, the solution was simple: We created a spot reward and recognition program called the "Big Fish" (based on the **FISH! Philosophy**), which allowed team members to recognize each other and offer meaningful, unique, specific, *and* timely recognition. We also got approval to award recipients with an extra-comfortable chair, a half-day of PTO, a chair massage, or a free beverage at the coffee shop (that also served noncoffee drinks). It cost us nothing but it earned us amazing good will.

We kept our year-end company-wide programs, but by adding timely rewards and recognition, we increased employee satisfaction in meaningful ways. Timely rewards make for happier employees, and they help keep employees connected to the company's mission and vision.

Getting Started

First, block out sixty minutes on your calendar this week: thirty minutes to pay attention to all the good stuff your team does and thirty minutes to walk around and thank them for the work they do. Then, block out thirty minutes with your direct supervisor to discuss spot rewards for jobs well done. Start with your team and then expand to the rest of the department. Finally, take five minutes to pat yourself on the back. You're recognizing your team in a meaningful, unique, specific, and timely fashion—and that means you're doing it right. Congratulations on a job well done!

ABOUT THE AUTHOR

Phil Gerbyshak, a fifteen-year veteran of the IT industry, is the founder of the Make It Great Institute, where he works with organizations to increase employee and customer engagement by using social media to create and build relationships. Phil is a prolific author and presenter who's passionate about helping you get more of what you want…and less of what you don't.

You *Must* Have a Service Catalog

By Stephen Mann
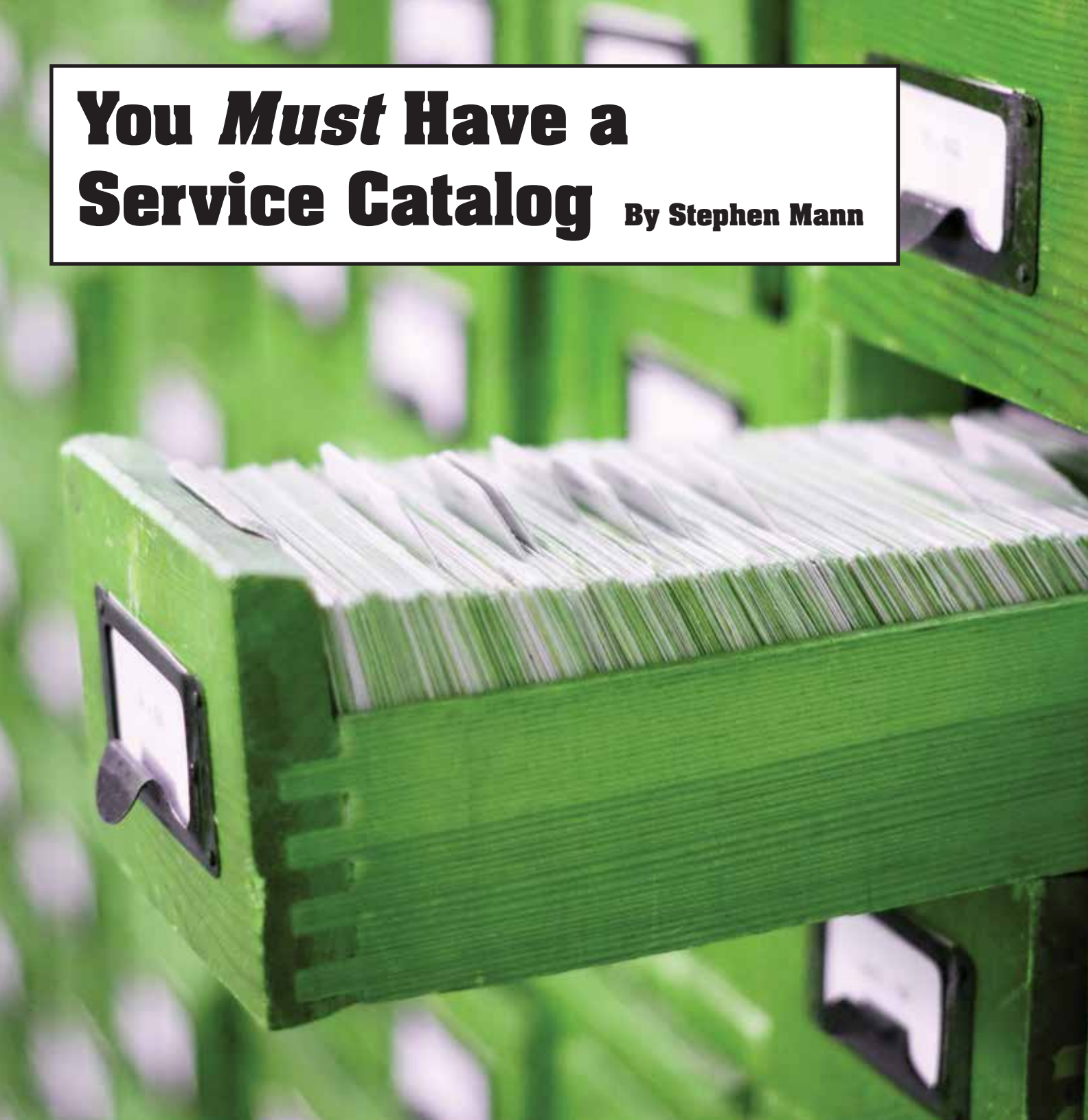
Before the arrival of ITIL v3 in mid-2007, many large IT organizations were struggling to overcome CMDBPD: configuration management database project despair. Then ITIL v3 gave IT organizations a shiny new tool: the service catalog. Now, you'd have thought that their CMDB failures—stemming from the lack of a real understanding of purpose and need, planning, commitment, etc., and too heavy a focus on the technology and data—would have left IT organizations in the ideal position to attack service catalogs with a new and winning approach. But we didn't learn (well, many of us didn't learn). For many, the service catalog became CMDB 2.0.

Thankfully, the title of this article isn't my advice to you. It's just another bold statement about ITSM that I wish I weren't hearing or reading almost weekly. Our obsession with the service catalog—just one among many ITSM tools, modules, or capabilities—is over five years old, and it seems every IT organization has either decided or been told that the service catalog is an absolute must-have. However, in my opinion, it's best to look back before we move forward.

The Wonder Years

While the concept of the service catalog has been around for well over a decade (in 1999, I demoed an online employee portal mockup for the UK Post Office's Innovation Lab), ITIL v3 gave it a big push. There are many methods for collecting statistics on the demand for, adoption of, and success of service catalog initiatives, but my favorite isn't exactly scientific: Based on audience feedback during presentations at various global ITSM events, it would seem that 30-50 percent of organizations had a service catalog in 2012-2013 (varies widely based on geographic location). Of that, less than two percent felt they were receiving the promised or expected benefits from their service catalog initiative.

For a somewhat more scientific take on the issue, when Forrester, the global research and analysis firm, asked forty billion-dollar corporations about the maturity of their ITSM initiatives, service catalog management scored the lowest, behind problem, availability, and configuration management. (You might have noticed a sneaky shift from service catalog to service catalog management in this. It was deliberate.)

Where Is the "Management" in Service Catalog Management?

As it was with the CMDB, organizations focused on the service catalog *tool* at the expense of service catalog *management*. Our unhealthy focus on technology and data, our belief in limited best practices, and our use of somewhat inappropriate terminology constrained and misguided our thinking. The result? Many IT organizations, all of which had the best of intentions, succumbed to the common stereotype of being overly focused on IT inputs at the expense of business outcomes.

There's no doubt that an effective service catalog can help both the IT organization and its customers. Service catalogs can:

- Provide better support for existing ITSM processes, such as incident and problem management, change management, service level management, and service reporting, and they can improve service delivery and customer satisfaction, which can potentially reduce costs.
- Improve IT/business alignment (I know, it's a bad term, but it's part of our common language, for better or worse). A service catalog—or, I would argue, service catalog management—can help improve communications, the understanding of needs (and capabilities), expectations

management, customer experience/satisfaction, and maybe even the current need to demonstrate the business value of IT.

- Improve financial control, including cost and pricing transparency, chargebacks, and demand management (through differential pricing models).
- Increase operational efficiency, especially through the automation of ordering and provisioning. The latter can potentially deliver considerable time and cost savings.

Can all this be achieved by simply buying and populating a service catalog? Probably not, but people still try.

Common Service Catalog Mistakes

Before we look forward, let's briefly consider some of the most common perils and pitfalls of service catalog (management).

1. **The "Let's buy a service catalog tool!" approach (which is not dissimilar to the "Let's buy an ITSM tool!" approach).** This is where the service catalog is seen as a technology project rather than a business-driven change.

2. **Limited or misjudged service catalog (management) initiative objectives.** The service catalog must be more than just a list of IT services (although for some organizations it could be all they want and need, and maybe Microsoft Excel would suffice).

3. **Limited understanding of the IT services that should populate the service catalog.** Service definition is difficult, but that's no excuse. Any provider of services should know what they provide, from a customer perspective, and the associated attributes.

4. **Critical acclaim, minimal adoption.** The service catalog is pushed out to the business with great fanfare…followed by little to no business adoption.

In light of the above, is your service catalog initiative a train wreck waiting to happen? Even if it's not, please also consider the following.

The Building Blocks for Success

As with most business activities, it's important to understand the difference between processes and enabling technologies. "People and process before technology" is a common ITSM mantra. As alluded to above, without the support of a strong service catalog management process and the efforts of capable people, your service catalog (tool) will struggle to deliver the anticipated benefits. Simply implementing the technology and populating it with an initial "data grab" will deliver a suboptimal solution that decays over time: a service data graveyard.

Things are getting better, though. We've seen a shift recently toward trying to see beyond service catalog (management), to looking beyond the tool and the process to view the activities and enabling technologies from the customer's perspective: what customers want and need, instead of what the IT organization thinks it should be doing, which is always a combination of herd mentality and best practices. **James Finister** and **Rob England** are two vocal proponents of this shift. Rob, for example, has differentiated between the service catalog (a list of services, perhaps the output of service portfolio management) and the service request catalog. This makes sense, given that one possible cause of service catalog failure is that we really don't know what we are trying to achieve/deliver.

Service Portfolio Management — **Service Catalog** — **Self-Service** (portal + workflow + automation)
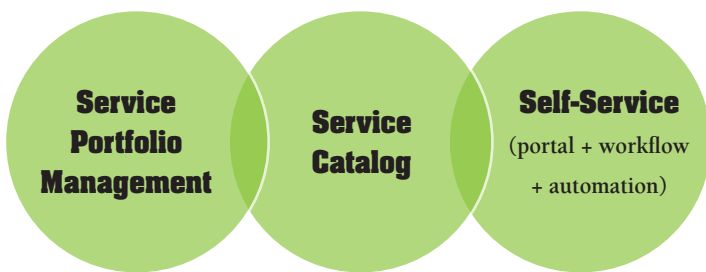
The figure above is a simplification of our great expectations for the service catalog: we expect it to do it all, but our focus is too narrow. Is it any wonder that so many service catalog initiatives are considered suboptimal if we charge at the middle circle and fail to fully consider the other two?

Part of the problem is that the term *service catalog* is a poor container for our wants, needs, and desires. Using this term only limits our thinking and our chances of success. Instead, we should start thinking in terms of service portfolio management—albeit with a broader definition: the "portfolio management of services" rather than the "management of the service portfolio"—and self-service and automation.

Improving the Odds of "Service Catalog" Success

So what can you do to help ensure that your service catalog initiative doesn't die a slow death in the hands of misguided project managers and unreceptive customers? Here are a few suggestions.

1. **Think service catalog management, not just service catalog.** What are your processes for reviewing and changing service catalog content, or changing the service catalog and its related processes?

2. **Service portfolio management should be the precursor to service catalog management.** You'll need to understand your end-to-end services (e.g., what they are, who uses them, what they do, how they are composed, what they cost), and in business terms rather than IT terms.

3. **Get the right people involved.** This is the business's service catalog, not IT's. IT should not drive the look, feel, or content of the service catalog, the business should.

4. **Be clear about the objectives for service catalog management and not just the tool.** You'll need to identify the issues and opportunities you're trying to address. The objective should definitely not be "creating a service catalog," but it should definitely be more than a list of IT services. What are you looking to achieve?

5. **This isn't just a data-collection exercise.** Interestingly, for some organizations, service catalog has reignited the need for a CMDB and associated service asset data.

6. **Ensure that your ITIL processes are fit for purpose.** To get the best out of your service catalog, you'll need the support of certain ITIL processes, such as financial management (service costing through to accounting), service level management, and configuration management.

7. **Don't emphasize the front end (shopping cart) at the expense of back-end data and activities (e.g., consumption monitoring, automated provisioning).** Your service catalog should be more than an Amazon-like storefront and shopping basket (unless this is all your business actually needs).

8. **Align your service catalog initiative with your corporate automation initiative.** This will help ensure that you're leveraging relevant experience, supporting the integrations, and avoiding the duplication of effort (and possibly cost).

9. **Continue to involve your customers.** Actively seek feedback and be open to criticism. Monitor usage. Offer coaching and training. Try different strategies for increasing service catalog use and improving ease of use. Nurture and feed your service catalog like you would any other living thing.

10. **Think ahead.** Look at the potential for exploiting shared services in the future (a single employee portal, perhaps).

So, is the service catalog really a "must-have"? By itself, definitely not. But as something that uses service portfolio management and people, process, and technology to deliver the potential business benefits of self-service, workflow, and automation? Absolutely. But only if you do it right.

ABOUT THE AUTHOR

Stephen Mann is a keen blogger and ITSM industry commentator. His career has included stints in IT research and analysis (at the UK Post Office, Ovum, and Forrester), consultancy, ITSM, asset management, innovation/creativity facilitation, project management, finance, and internal audit. Stephen is currently a senior manager in product marketing for ServiceNow, where he hopes he's writing stuff that makes a difference. Follow him on Twitter (**@stephenmann**)!

TECH TRENDS: Workforce Management

We asked Fancy Mills, author of "Workforce Management: Underutilized Metrics for Success" (p. 39), to share a list of the resources, tools, and software she recommends to her clients. If you've used or worked with any of the following, we invite you to share your feedback in the **HDI Buyer's Guide**.

Tools and Resources

www.CallCentreHelper.com
This online magazine provides community and resource information for the call center industry and a free Excel-based Erlang calculator.

www.Erlang.com
This site provides information and tools on the traffic and queuing methodology created by A.K. Erlang in the early 1900s, focusing on Erlang B, Extended Erlang B, and Erlang C. You can also download free Excel-based Erlang calculators.

www.ICMI.com
ICMI's QueueView is a staffing calculator for Windows based on Erlang B and Erlang C calculations.

www.KoolToolz.com
Low-cost and free workforce management tools for forecasting, planning, scheduling, and analyzing service performance: cc-Modeler Professional, cc-Modeler Lite, and Schedule24.

www.WFMWizard.com
Affordable forecasting, planning, and staffing tools for small and medium-sized inbound contact centers—try before you buy with a free thirty-day trial!

Software

With the exception of Pipkins, each solution in the list at right can be found in the Gartner Magic Quadrant report for workforce optimization.

Aspect
Workforce Optimization Platform
www.Aspect.com

Calabrio
ONE Suite
www.Calabrio.com

Call Copy
Workforce Management
www.CallCopy.com

Genesys
Workforce Optimization Software
www.GenesysLab.com

Interactive Intelligence
Workforce Optimization Suite
www.Inln.com

Nice
IEX Workforce Management
www.Nice.com

Pipkins
Vantage Point
www.Pipkins.com

Teleopti
Teleopti CCC
www.Teleopti.com

Verint
Impact 360 Workforce Optimization
www.Verint.com

HDI Support Center Assessment Services

Managing a support center is a journey of continual improvement. You don't have to go it alone! Engage HDI to discover your support center's true strengths and improvement opportunities!

HDI offers different levels of assessments designed to fit every support center's needs and budget. Assessment services are based on the HDI Support Center Standard, developed by the HDI International Certification Standards Committee as a resource to help you identify best practices for your support center.

Benefits

- Establish a current-state baseline to measure the impact of future changes.
- Gain proof of performance to use in marketing your support center to the organization.
- Obtain a neutral, third-party opinion to help overcome internal biases.
- Benchmark your maturity against a recognized industry standard.
- Identify critical shortcomings in resources and processes.
- Receive guidance to help you prioritize improvement initiatives.

HDI Support Center Best Practices Assessment

Get a true picture of your support center's performance compared to industry best practices. This service provides a current-state maturity baseline, gap analysis, and expert recommendations for improvement.

HDI Support Center Assisted Evaluation

An HDI expert will help you understand the HDI Support Center Standard and accurately evaluate your support center's maturity level. The result is a current-state maturity baseline and gap analysis that highlights opportunities for improvement.

HDI Support Center Self-Evaluation

Use this online tool to evaluate the maturity of your support center and identify gaps so you can create an improvement plan. Free to HDI members at the Gold level and above!

Pricing starts at $5,000.
Contact your account manager for more information.

Just Released!
The newly updated HDI Support Center Standard is now available.

Download your copy today!
www.ThinkHDI.com/Standard

The HDI Support Center Certification is also based on the HDI Support Center Standard. Find out more: **www.ThinkHDI.com/Services**.

Learn how HDI can help by visiting www.ThinkHDI.com/Services or calling 800.248.5667 today!

Celebrate Customer Service Week with HDI!

I look forward to October every year. Why? Because of one very important celebration, a celebration that honors the frontline customer service professionals who give 110 percent to providing a truly amazing customer experience: Customer Service Week. During Customer Service Week, we reward our customer service and support professionals' performance, raise company-wide awareness of the importance of customer service, thank the other departments in the organization for their support, and, of course, remind our customers of the organization's commitment to their satisfaction.

HDI proudly supports Customer Service Week. We provide our members and customers with resources to help them plan for Customer Service Week, including stories of celebration and inspiration from other members. We provide motivating, inspiring, and fun-filled activities and games your team can play throughout the week, and we reward our members and customers for their commitment to customer satisfaction with contests and prizes that boost morale and motivation. Last, but certainly not least, HDI is hosting an action-packed team-building workshop on October 9. This webcast series features three amazing speakers, including Hall of Fame speaker Chad Hymas, Travelocity and Kayak founder Terry Jones, and Kirk Weisler, as well as opportunities to participate in live, facilitated chat discussions with industry experts, solution providers, and HDI members.

Join HDI as we celebrate and honor you and your teams!

Schedule-at-a-Glance

All times EDT

11:00 – 11:30 a.m. | Orientation, Facilitated Chats, Networking, and Resource Center Browsing

11:30 a.m. – 12:30 p.m. | "Eagles Don't Fly in Flocks, and Seagulls Never Get Lonely," with Chad Hymas

12:30 – 12:45 p.m. | Intermission: Chat with community leaders

12:45 – 1:45 p.m. | "The Business of Innovation," with Terry Jones

1:45 - 2:00 p.m. | Intermission: Chat with community leaders

2:00 - 3:00 p.m. | "The Know-Do Conundrum and the DO-NOW Imperative," with Kirk Weisler

3:00 – 3:15 p.m. | Intermission: Chat with community leaders

3:15 p.m. | Prize-winners announced

Please share your Customer Service Week celebrations with us. We want to hear your stories and see your photos so we can share them with members and customers next year. You never know who you might inspire and motivate!

Send your stories and photos to Leslie Cook (lcook@ThinkHDI.com).

— Leslie Cook

Brew City HDI Welcomes IT Executives

Brew City HDI is hosting its fifth annual IT Executive Panel on November 19, 2013. Past panels have featured executives from a wide range of organizations, including Aurora Health Care, Brookdale Senior Living, Marquette University, Quad Graphics, Robert W. Baird, Thomson Reuters, and We Energies.

Join us at the Hudson Business Lounge (pictured below) for executives insights into cloud computing, the future of IT, big data, and more. We're expecting this event to be our biggest event yet, and, if you're in the Milwaukee area, we hope to see *you* in November!
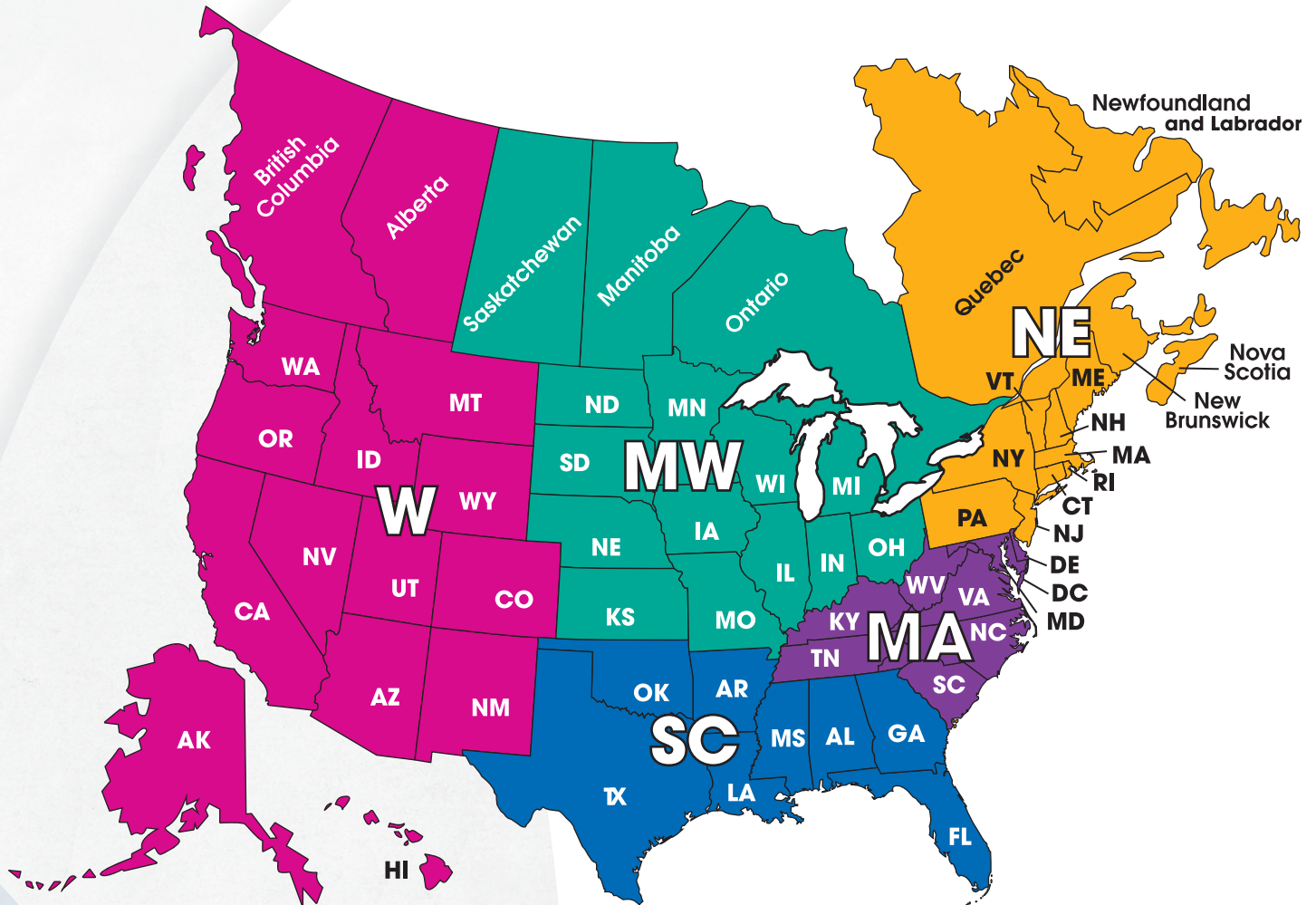
For more information about this and other events, visit www.BrewCityHDI.com.

— Phil Gerbyshak

Have a question about HDI's
PRODUCTS AND SERVICES?

Contact your regional account manager for assistance.

VICTORIA BECH - *WEST*
719.785.5354
vbech@ThinkHDI.com

TINA BUCHBERGER - *MIDWEST*
773.417.2238
tbuchberger@ThinkHDI.com

SHEA KNAUFF - *SOUTH CENTRAL*
904.819.6647
sknauff@ThinkHDI.com

JENNIFER QUIGLEY - *NORTHEAST*
719.785.5355
jquigley@ThinkHDI.com

TIFFANY VAUGHN - *MID-ATLANTIC*
704.795.9850
tvaughn@ThinkHDI.com

You can also reach the HDI Customer Care Center at
800.248.5667 or **Support@ThinkHDI.com**

HDI Certification and Training
COURSE SCHEDULE

Schedule is subject to change. Check www.ThinkHDI.com/Train2013 for updates.

COURSE	Public Classroom (Member Price/Price)	Virtual Classroom (Member Price/Price)	Online (Member Price/Price)	November	December	January
PROFESSIONAL CERTIFICATION COURSES						
HDI Customer Service Representative	$795 / $895	$795 / $895	$345 / $395	—	5 Virtual Classroom	—
HDI Support Center Analyst	$1,395 / $1,495	$1,395 / $1,495	$645 / $695	1 – 15 Blended Learning 4 – 5 Houston 4 – 5 Denver 4 – 5 Toronto 11 – 12 Raleigh 11 – 12 Austin 18 – 19 Dallas 20 – 21 Vancouver	2 – 3 Atlanta 2 – 3 San Diego 3 – 4 Virtual Classroom 9 – 10 Washington, DC 11 – 12 Montreal	13 – 14 New York City 13 – 14 Dallas 22 – 23 Toronto 24 – Feb. 7 Blended Learning 27 – 28 Minneapolis 27 – 28 Los Angeles
HDI Desktop Support Technician	$1,395 / $1,495	$1,395 / $1,495	$645 / $695	4 – 5 Washington, DC	9 – 10 Virtual Classroom 16 – 17 Montreal	—
HDI Support Center Team Lead	$1,595 / $1,695	—	$745 / $795	1 – 15 Blended Learning 18 – 19 Vancouver	9 – 10 Dallas 9 – 10 Montreal 12 – 13 Phoenix	20 – 21 Toronto 24 – Feb. 7 Blended Learning
HDI Support Center Manager	$1,895 / $1,995	$1,895 / $1,995	—	6 – 8 Denver 6 – 8 Toronto 13 – 15 Raleigh 13 – 15 Atlanta 13 – 15 Austin 19 – 21 Virtual Classroom	4 – 6 San Diego 4 – 6 Montreal 11 – 13 Washington, DC 11 – 13 Dallas	14 – 16 Virtual Classroom 15 – 17 Dallas 29 – 31 New York City
HDI Desktop Support Manager	$1,895 / $1,995	—	—	6 – 8 Washington, DC 13 – 15 Los Angeles 20 – 22 New York City	4 – 6 Chicago	—
HDI Support Center Director	$2,795 / $2,895	—	—	—	4 – 6 Atlanta	—
HDI Certified Instructor	$2,495	$1,995	—	19 – 21 Virtual Classroom	11 – 13 Colorado Springs	—
Knowledge-Centered Support Fundamentals	$595 / $645	$545 / $595	$295 / $345	—	10 – 12 Virtual Classroom	—
Knowledge Management Foundations: KCS Principles	$1,495 / $1,595	—	—	6 – 8 New York City 20 – 22 Chicago	—	29 – 31 Toronto
ITIL Foundation	$1,395 / $1,495	—	$99 / $149	—	—	—
PROFESSIONAL DEVELOPMENT COURSES						
Building Your Service Catalog	$595 / $645	$545 / $595	—	—	—	28 – 30 Virtual Classroom
Coaching Skills for Quality Support	$1,395 / $1,495	—	—	—	2 – 3 Atlanta	—
Problem Management	$595 / $645	$545 / $595	—	12 – 14 Virtual Classroom	—	—
Structured Problem Solving for the Support Professional	$1,395 / $1,495	—	—	—	2 – 3 Los Angeles	—

View the complete course catalog online at
www.ThinkHDI.com/Train2013.

WAYS TO REGISTER:

www.ThinkHDI.com/Train2013
800.248.5667 | Support@ThinkHDI.com