March/April 2006

SUPPORTWorld℠

Keeping the IT Support Community Connected

"Shifting the IT Perspective"

What is IT-Business Alignment?

Strategy

How to Build an Actionable IT Service Catalog

Service Level Mgmt.

ITIL Spurs New Generation of Service Desk Technicians

ITIL

Going Global with Support – Part II

Global Support

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SUPPORTWorld
Keeping the IT Support Community Connected

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letter from the EDITOR

SupportWorld Readers,

It seems there is one thing that IT consistently serves up and that is change, in the various forms it encompasses, within all areas of the business. Technology makes it easy to reach past today's business structure towards another, something I'm sure you encounter every day within your own IT departments. I hope this magazine helps guide you through the ever-changing dynamics of IT and support.

There is so much to look forward to in this edition of *SupportWorld*, from an interview with Arun Shuklaon on *Managing Complex Support Issues*, to a look at HDI's own Support Center Certification Standards: *The Road to "Best in Class" Service*. You're sure to find something inside to satisfy your quest for knowledge and understanding of IT support.

We are all aware of how important customer satisfaction is within our organizations, and with this in mind, I am pleased to introduce to you HDI's Customer Satisfaction Index (HDI-CSI), a new third-party survey and reporting service that offers IT support centers, help desks and service desks with secure, reliable, robust, and, statistically valid customer satisfaction measurement data. HDI-CSI provides customer satisfaction scores, including valuable comparisons against organizational goals as well as comparisons to peers in the same industry. You can find more information about HDI-CSI on the HDI Web site.

As I write this, I'm gearing up for our annual conference, which is taking place in Nashville, March 19-22. I'm looking forward to seeing all of you there. As always, please feel free to e-mail any editorial, comments, or suggestions for upcoming issues to **jneider@ThinkHDI.com**.

Best Regards,

Julie Neider

Julie Neider

Please send your comments and questions regarding SupportWorld.
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The Daly

Managing Complex Support Issues:

A Personal Interview with — Arun Shukla —

By Cinda Daly

Technical support folks feel quite comfortable solving customer problems as long as the problems are about identified fish in known waters. Put them in situations where they lack knowledge and experience, and they are like fish out of water. Effective troubleshooting becomes a probability game, a firefight, a best guess solution, or an escalated issue attached to an irate customer. Mix in multiple platforms, multiple versions, multiple technologies, and there will be more and more situations where help desk analysts will find themselves out of water—on the barren desert, perhaps.

Arun Shukla, a 22-year international IT veteran now with Kepner-Tregoe, talks about this dilemma. He suggests a logical process that trained help desk analysts can use to assemble the situational data, define the problem, and solve it regardless of the technical environment, to the tune of 40-50 percent improvement in mean time to resolution.

*The Daly Interview™ is a publication of Focus Events, Inc.
This interview was written exclusively for ThinkService, Inc.
by HDI 2006 Program Chair, Cinda Daly,*
***CindaLDaly@alltel.net**.*

Interview

Daly. ***What are the most common reasons that support analysts find themselves short in knowledge?***

Shukla. First, the threshold of capacity of human learning—most help desk analysts are good with two, three, maybe four products. However, with the growing complexity and heterogeneity of applications and hardware platforms and the increasing convergence of technologies where diverse applications become dependent on each other in a black box, the analysts just can't know it all.

The second reason is the work environment where analysts perform. The environment reinforces and rewards a "fix first, solve problems later" attitude. Once the ticket gets opened, there is little in terms of appraisal. Driven by the statistic of reducing mean time to resolve, the analyst jumps into proving a cause for the problem, using hunches. Much of the troubleshooting process from there on is about proving the assumed cause. Maybe it's the right fix; perhaps not. It's more luck than process. As the clock ticks or failure occurs, it shatters the analyst's confidence.

Daly. ***Many companies are using well-defined scripts to offset this situation. What's your take on scripts?***

Shukla. Frontline folks have no problem following the script, to a fault oftentimes. That process works all right for a well-known or routine situation. However, the moment the situation deviates slightly from the script or the customer raises a complex issue, the script falls apart. The customer, sensing that he is being scripted and that there is an absence of logic, gets emotionally charged. He assumes that the issue is outside the analyst's bandwidth, so begins to question the veracity of any help desk. Trust is gone. With the growing complexity of the help desk environment, a script gets dated the day it's created, and its utility is diluted from there on.

Daly. ***Isn't this where skills-based routing technology comes into play?***

Shukla. Skills-based routing is a band-aid rather than a permanent fix. The routing rule typically assigns problems about a product to a defined expert. Unfortunately, there is no crystal ball that can predict the volume or the nature of incoming issues. This often leads to situations of feast or famine. Since no one can afford the luxury of unlimited headcounts, what happens in skill-based routing is that one person gets so much work that he burns out or runs out of bandwidth. Regardless of the technology or systems put in place, the backlog of cases never comes down. When complex problems arise, none of this applies.

Daly. ***It sounds as much like an on-going training and knowledge sharing problem as anything. Right or wrong?***

Shukla. Unfortunately, many of the help desk improvement projects are about throwing in more technology and more technical training. These seldom facilitate quantum leaps in customer sat scores or reductions in mean time to resolve. On the contrary, more technology just speeds up the dart coming towards the help desk and invariably exposes any chinks in the armor.

Let's consider a typical scenario using a knowledge management tool. Analyst A solves a problem and puts the solution into the KM solutions database. Analyst B comes across with a similar problem (maybe matching, maybe not), but doesn't find A's solution or root problem because each analyst considers his or her way as the right way of troubleshooting. So, B puts in his own version of the solution. Or, Analyst B believes that both problems were the same, finds A's solution, sends that same patch, even though it's not the right one, and consequently causes more problems for the customer. It's all a hodgepodge.

KM tools, regardless of their growing sophistication, are probably the most misused pieces of technology in support organizations. The reality is that it's the process that's not working. So, the long-term solution is a defined process, one that is independent of technology, platform, language, or geography.

Daly. ***Perhaps the knowledge mix within the support organization needs to change. Is there some logic to apply to the way companies should hire staff and train them to avoid the frequency of traveling in unknown waters?***

Shukla. Customers do not care about the complexity of help desk environments—they demand homogenous support. While content expertise is relevant, the organizations should put more emphasis on the underlying troubleshooting process. That is the only route to deliver to the customer's expectations rather than perpetuate the firefighting, hunch-style support mode.

Daly. ***Most support organizations say that they have a process. You're suggesting that the process must be fundamentally different than what has traditionally been in place. Bottom line, outline the key components of the process.***

Shukla. The organization's claim for a troubleshooting process should be tested by the consistency of support. A quick analysis of time-to-resolve will highlight variability. It tells that if there indeed is a process, it is not being followed. Why? Because analysts do not believe in the process. It breaks down whenever there is anything out of the ordinary. Hence, the need for something fundamentally different.

The troubleshooting process for mission critical support at Kepner-Tregoe begins with an assessment of the customer's situation, using logic to assemble the data, define the problem, and solve it. The process specifically includes clarifying and prioritizing the customer's pain points, identifying the problem, locating it, and quantifying it. If the help desk analysts are up skilled in this logic-driven process and the performance system promotes its use, then the help desk troubleshooting environment is independent of the technical expertise of the person taking the first call. It greatly improves internal communications as there is a one-right-way of solving problems.

Daly. ***This suggests that customer satisfaction scores could also improve using this process.***

Shukla. Yes, this process does several things for the customer on the other end of the line. When the customer recognizes that he is being listened to and not scripted, and that the analyst is asking a logical set of questions to lead the customer through a process, it builds confidence and trust both in the analyst and in the organization overall.

Daly. ***How does the escalation process change in this scenario?***

Shukla. Escalations will happen each time the frontline is stretched to its knowledge and experience. However, in the process I'm talking about, the backline takes over a ticket that, even though is unresolved, is well described. It is structured precisely the way the backline would have gone about describing it. It reduces the annoying back and forth with customers, and thus saves a lot of dead time.

Daly. ***You will discuss this in more detail in your session at HDI 2006. Can you share an example of this process in practice?***

Shukla. Several prominent companies are using this process, including Dell, Cisco, Sun, CA, Siemens, Nokia, and others. They have recognized, among other things, that not every support ticket needs this rigor, just certain categories where complex issues or converging technologies bear down on the problem. In one instance, if the frontline can't solve the problem in 30 minutes, they escalate it. The problem is well described using the process, and the person who receives it uses the follow-on steps to solve the problem. The chain of logic in the process is never broken. Results these companies are showing include a 40-50 percent reduction in mean time to resolve and parallel increases in customer satisfaction scores.

Daly. ***What organizational changes—both structurally and philosophically—need to occur to support this best practice?***

Shukla. Structurally, identify and define the critical few areas needed for improvement, not everything imaginable. Next, establish measures and causal factors specific to those areas. Then, start mapping the process. Invest the time and resources to get better at removing white spaces or gaps in the process while continuously removing the no- and low-value add steps, and that's precisely when you'll start seeing rapid results and lasting value.

Daly. ***And, philosophically?***

Shukla. Philosophically, we need a paradigm shift whereby the help desk should stop claiming that they are supporting a product or an application. The help desk is about supporting the customer's business. It is about troubleshooting incisively while guiding the customer through the process, proving it to the customer. Only then can we claim to be getting ahead of the curve.

Arun will offer an in-depth look at these processes to help your support analysts feel comfortable in complex support situations in "Managing Issues That Stretch Beyond Help Desk Expertise" at HDI 2006. He also will add his insight about outsourcing in the Making Connections panel discussion, "Outsourcing Unplugged."

Striving Toward GREATNESS

by ***Shep Hyken****, CSP*

As we strive toward greatness in the area of customer service and relations, here are a few simple strategies to deliver an even higher level of service. It all goes back to managing your Moments of Truth—each and every contact you have with a customer—and creating Moments of Magic.

1. **Benchmark with the competition.** You must know how you stack up against your competition. Find out what the competition does well, even better than you. Then use this as the minimum standard. Do not copy! Simply use this as a starting point. If the competition is doing something you are not already doing, then figure out how to do it even better. The benchmark is not to set a standard or a goal. It is to become the eventual starting point on which to build. Your goal is to differentiate yourself from the competition, to be better than, not the same or as good as them. You don't want to be another choice, but the only choice.

2. **Benchmark outside of your industry.** At a recent seminar I had eight groups share the best and worst customer service experiences they ever had (outside of their own industry). They came up with some great stories about the good and the bad. What amazed me was that the majority of them had to do with going to a restaurant. Then it hit me. If we think back to the best service we ever had, and it takes us to a restaurant, then why not try and emulate what this outstanding restaurant does for its customers? Think about the waiter that seemed to always be there when you needed him. Or, the food that seemed to arrive in a timely fashion, cooked to perfection. Draw parallels between your business and others outside of your industry. Look at what other companies do to create legendary service and simply bring their ideas to your own company.

3. **Discover what you do best and exploit it.** In the process of benchmarking with the competition, you may, if you don't already know it, find out you do something different or better than they do. Make sure your customers know this. This could be one of your differentiation factors. It may be one of the reasons to do business with you. Just make sure what you do better matters to your customer.

4. **Know your customers.** This sounds so simple, but so many companies miss the mark. I have an exercise I do at some of my seminars. I ask the audience to list what they think the top five customer expectations are. Most of the time they break into small groups to do this. Once the answers are shared, they get a reality check. We get data through customer surveys and focus groups. Guess what? Almost every time what the employees think the customer expects is not actually what the customer really expects. Getting to know your customers is not that difficult. You can hold focus groups, informal surveys (low response for mail, higher for phone), solicit comments and feedback at the same time you are doing business, etc.

5. **Know the value of your customer, specifically the dollar value.** It may put a lot in perspective for you. Knowing the dollar value of a customer will help you make decisions about how you handle complaints, problems, special requests, etc.

6. **In this cutting edge world we live in, we must stay up with technology.** We can't be left in the dust! Be on the cutting edge, which means taking advantage of new software, more powerful computers, and the Internet. Many of my clients have fought being a part of the Internet.

   Faxing used to be the rage. Now, it is e-mail. E-mail is the easiest way of quick, non-personal contact communication. The ability to get a message, a letter, computer file, etc., not just to another person, but groups of people, has never been easier. And, if you sell any type of product or service (and I know you do) and are not yet using the Internet to exploit it, you are missing a great opportunity for exposure. You can also use an Internet site as a way to help promote your image. We have one client who uses their site not to sell, but to help people decide if they want to work for their company. They even have employment applications that can be filled out and sent to the company via e-mail.

So there you have six simple things to help you create a successful service strategy. While these six things focus on what you and your company should do, please don't lose sight that it is all in the best interest of the customer.

After all, the customer is the reason we are in business. Your company can't possibly be successful if no one is buying what you are selling, and you aren't creating MOMENTS OF MAGIC.

Shep Hyken**, CSP is a professional speaker and author who works with companies who want to develop loyal relationships with their customers and employees. For more information on Shep's speaking programs, books, tapes and learning programs contact (314)692-2200 or **Shep@hyken.com. (www.hyken.com)

by Robert S. Last

"Shifting the IT Perspective"

What is IT-Business Alignment?

One of the difficulties with understanding the concept of business alignment is finding a definition of what exactly it means to IT and support managers.

A Google search using the words "business alignment" produces 14,400,000 citations; using the words "business alignment + information technology," returns 20,400,000 citations. No wonder people aren't sure what it means or how to achieve it! For the purposes of this discussion, business alignment is defined as:

- *Positioning the IT organization to support, facilitate, and enable the business to be successful;*
- *For the support center it means delivering services that support employees trying to do their jobs by solving their problems, answering their questions, and facilitating techniques and processes that enable them to meet the goals of the business or organization in an efficient and cost effective manner.*

For the IT organization this requires insight into the provision and delivery of services that extract value from hardware and software, and leadership that provides innovation in business practices that benefit the business or organization as a whole. Put another way, ***IT is in the technology acquisition and service delivery business.*** Its customers are the multiple groups of end-users that use IT to do their jobs. For IT managers and their employees, this requires them to step outside of their comfortable technology environment and to think like entrepreneurs serving their customers.

We Have a Failure to Communicate

There is a large and disabling failure to communicate between IT organizations and their parent businesses and organizations. Like any troubled relationship, the blame for the pain resides in equal amounts with all the partners. And, like most troubled relationships, one of the partners has to take a step forward on the journey towards healing the relationship.

On the IT side, what we see is an attitude from many of our organizational leaders, and an arrogant one at that, that says, "I have an MBA, I'm answerable to the stockholders, and I'm smarter than you are." This translates into an impatient, short-sighted rush to complete projects sooner then is technically wise, an indifferent attitude towards customer service, and a dangerous tendency to add requirements to a project after the Scope of Work ("Project Creep") has already been completed—all of this while reducing staff, budgets, threatening outsourcing or offshoring, and having unrealistic expectations about what a new application project can achieve.

On the business and organizational side, what they see is a group of "geeks" that do not understand the needs of the business or the organization. They consider IT to be a large, slow-moving, incompetent, uncompromising bureaucracy that hides behind "geek speak," and costs a fortune. This business perspective is partly caused by a generation gap between IT and the business. Business has been around since the Roman Empire; IT was born with the IBM 360 in 1964. Like parents and teenagers since the beginning of time, they have a difficult time understanding each other.

Technical support has an even more difficult time being understood and taken seriously by its corporate parent then the rest of IT does. If the corporate parent doesn't "get" IT, all too often IT doesn't "get" support. The common IT opinion on support is that a large number of people—usually more then two—sit all day, answer the phone, talk to customers, and create more work for the IT department that has "real work" to accomplish. The corporate parent sees only a large cost center and resents having to deal with customer-related problems that IT should have solved in the first pace.

It's amazing anything gets done at all!

The Case for IT Credibility

Bridging the divide between the key players in an organization and IT is the responsibility of IT's management. Someone has to step forward and initiate a dialog based on the needs of the business and the capabilities of the IT department, and by extension, the support center. If IT is to remain relevant in today's global market, it has to prove that it has the ability to solve problems and complete projects efficiently and cost effectively; IT's support centers have to respond quickly to customer problems, solve them, and send this information back to its IT superiors and organizational parent.

This reconciliation begins when IT management understands its role in the organization and how it is perceived by its customers. As is often said, "Perception is reality." This mindset is often unfair, imprecise, and sometimes just wrong, but it is also a reality of organizational life. Successful IT and support managers will be the ones that accept and embrace, as an organizational imperative, the need to develop, implement, and maintain service delivery systems that support the parent organization. Begin with a simple assessment of the organization's IT credibility; "IT credibility is derived from the degree of confidence your end-users have in core IT services. *Do your end-users believe that you provide quality support and systems management services?"* [1] Not getting a "seat at the table" where the big decisions are made? It might be how you and your department are perceived by the remainder of the organization.

IT managers should complete the IT Credibility Scale provided below to assess their organization's credibility; they should also ask the leaders of each customer group in the organization to complete the Credibility Scale and compare the results. If surprises result, and they usually do, it is time for a serious, candid, and in-depth discussion with your customers about IT's role in the organization.

Solving the IT-Parent Organization-Support Divide

In this century, the real value of IT and a support center are their ability to positively influence the work of its corporate parent. IT can no longer live in a sheltered world that derives its value from the technology that it "owns." It doesn't "own" anything; technology exists to facilitate the business of the organization and IT is the caretaker of that technology. "The ability of an IT executive to be able to directly and straightforwardly link the services [his/her] operation produces to the business element the service supports, can be the key to survival for the service, and perhaps, the executive." [2]

For the support center manager, the days of just counting contacts, repeatedly solving the same problems over-and-over, and submitting reports that no one can use have gone the way of the dinosaur. The support center has customers too and its position as a central point of contact positions it perfectly for delivering services to both the IT and parent organizations. When positioned correctly, the support center will solve daily operational problems, answer customer questions, provide information on releases and updates, training programs, guidance on how to best use technology, and most importantly; *it will identify problem trends, weak and broken processes, and opportunities for organizational improvement that will help employees return to productivity expeditiously, which will save the organization money.*

The Credibility Scale [3]

Give yourself one (1) Point for every area in which you have sufficient credibility with your end-users:	
Credibility Item	**Score**
Systems reliability and performance	
Quality and usefulness of end-user support	
Ability to resolve problems on a timely basis	
Quality of end-user relationships	
Relevance of IT policies and procedures	
Ability to complete projects	
Ability and willingness to understand end-user requirements	
Timely communication of systems changes	
0-3 points: Low Credibility 4-6 points: Moderate Credibility 7-8 points: High Credibility **Total**	

1 http://www.ittoolkit.com/cgi-bin/itmember/itmember.cgi?file=assess_oppty.htm.
2 Tardugno, Anthony F., Thomas R. DiPasquale and Robert E. Matthews, *IT Services: Costs, Metrics, Benchmarking, & Marketing,* (Upper Saddle River, NJ: Prentice Hall PTR, 2000) 38.
3 http://www.ittoolkit.com/cgi-bin/itmember/itmember.cgi?file=assess_oppty.htm.

The IT Roadmap to a New Perspective

Another true and ubiquitous adage is, “The first step in solving a problem is admitting that you have one.” For IT and support managers, this means understanding how they are perceived by their peers, customers, and executives and resolving “The tense standoff in which each group fulfills the other’s worst perceptions of each other”[4] and banishing it to the dumpster of history. It will be replaced by a desire and a commitment to provide the support center’s IT and parent organization customers the finest, most dedicated, sophisticated, and passionate commitment to service that it is possible to create. Support managers that solve problems and manage efficient, cost effective, transparent operations, that bring benefit to their internal and external customers, will be successful at ending the “tense standoff.”

As a practical matter, the successful IT and support organization will institute the following practices:

- It will treat its customers as strategic business partners deserving of the finest levels of service it is possible to deliver;
- It will strive, ceaselessly, to set realistic expectations for IT service and support center goals and capabilities;
- It will use Service Level Agreements and Operational Level Agreements to manage its customer relationships;
- It will develop, deliver, and forcefully advocate for customer training and self-help programs;
- It will be proactive and take advantage of every opportunity to add value to its services; it will go beyond the “break-fix” mentality and move towards facilitating the work of the organization in creative and visible ways;
- It will change itself and its service model to meet the needs of alignment with the parent organization;
- It will say “No” and defend its decision to reject reckless, impractical, and short-sighted projects that will cause more harm than good;
- It will use IT and service metrics in a strategic manner to find “lessons” for process and performance improvement;
- It will engage and encourage customer and end-user participation in IT projects through education, facilitation, and negotiation; and
- It will take a proactive approach to manage all perceptions about IT service and support through creative, educational, and practical dissemination of information, reports, and recommendations.[5]

A Most Exciting Time to Change Perspective

The independent, unreflective, self-centered mentality that has been the hallmark of many IT and support center operations is being pushed aside by the simple logic and good business imperatives of business alignment, and with good reason. According to CIO Insight’s research, 80 percent of business and IT executives believe their IT alignment efforts have a direct, positive impact on their company’s growth.[6] IT and support centers have entered the era of service, strategic partnership and communication between and among business units. For the first time in the history of IT and support, we are seeing a convergence of want, need, and vision for the mutual benefit of customers at all levels. The next five years will be the most exciting time in the history of our profession, but only for those business leaders and IT and support managers that are willing to set aside old, myopic ways of thinking and embrace the exciting opportunities that alignment has to offer in our global marketplace of commerce and ideas.

***Robert Last** has over 18 years experience in the support industry as a support manager, consultant, and trainer. He was a supervisor for the help desk at Cleveland State University for eight years, and the support manager for DataVantage, Inc., in Cleveland for three years. He is currently the Content Manager for HDI. He is the author of over two dozen articles and papers on technical support.*

[4] “Trust is Fundamental to Alignment,” Wayne Eckerson, SearchCIO.com, December 15, 2005, Page 2, http://searchcio.techtarget.com/columnItem/0,294698,sid19_gci152457,00.html.
[5] Adapted from ITtoolkit.com, “Top Ten for Alignment,” Right Track Associates, Inc., http://www.ITtoolkit.com.
[6] “How to Keep IT Up With a rapidly Changing Business,” Dan Briody, *CIO Insight*, December 5, 2005, Page 1, http://www.cioinsight.com/print_article2/0,1217,a=167930,00.asp.

How to Build an Actionable IT Service Catalog

by Rodrigo Fernando Flores

Every month I teach a two-day certification course on practical approaches to Service Catalog development. Interest in the subject is exploding and over the past six months I've worked with more than fifty organizations as they roll out their Service Catalog initiatives. From this broad spectrum of experiences, clear patterns have emerged. Whether you call them best practices or hard-won wisdom, there are clearly lessons to be learned from these experiences.

This article shares some of those lessons learned and suggests ways you can achieve success by avoiding the most common pitfalls. But before we talk about the typical mistakes in creating a Service Catalog, let's briefly make sure there is a common understanding of its purpose.

Why do you need a service catalog?

The primary purpose of a Service Catalog is to communicate how IT can help internal business customers and end users do their jobs. A successful Service Catalog helps the business understand the value that IT delivers—answering the questions: "What does IT do? How well does it do it?" And by mapping IT services more explicitly to business needs, it can help the IT organization understand how to add even more value.

The Service Catalog can also provide a vehicle to realistically set—and meet—business expectations. One of the common complaints I hear is that IT never meets it deadlines. You may think you're delivering what they want, when they want it. But without a Service Catalog to clearly articulate what will be delivered and when, at what price and what service level, your internal customers' expectations are likely to be very different than you think they are.

In addition, a Service Catalog can help standardize service delivery and improve service quality. Without a standard catalog of services, each request from the business is treated like a unique deliverable—achieving consistent service levels and continuous process improvement becomes virtually impossible. By guiding business users to order from a standard menu of services offered, the IT organization can drive repeatability and predictability, which is the only way to improve quality and reduce costs.

The end result of a successful catalog of standardized IT services is measurable and dramatic. Among other benefits, I regularly see:

- A 30 percent reduction in the operational cost of delivering IT services;
- Fifty percent faster cycle time for the fulfillment of services;
- Better allocation of resources to effectively meet business demand; and
- Most importantly, significant improvements in internal customer satisfaction.

Four Common Service Catalog Pitfalls

Pitfall #1:
Assume your customer understands what you're talking about…

A common mistake with many Service Catalog initiatives is defining services in technology terms, with service levels based on the metrics that are easiest for IT to track. We call this the *inside-out approach* and it almost always fails.

Successful Service Catalog projects start by asking users and business stakeholders what they want and what's important to them, and building the catalog around those success factors. This is the *outside-in approach*.

While IT tends to be organized around technical, skill-based, or asset-based silos, business users think in business outcomes. So, while IT's customers may be thinking about on-boarding new employees or their order-to-cash process, IT is talking about their change management process or distributing computing.

If you package and communicate your services and metrics with a focus on business-relevant deliverables, rather than the underlying technologies and technical service levels, you've overcome one of the greatest barriers to success.

Pitfall # 2:
If you document the Service Catalog, they will come…

Recently, I spent time with the IT infrastructure group of a large corporation that had spent two years implementing ITIL. They dutifully documented their processes and catalogued their services. But nothing changed in their interactions with business users. Despite having a list of IT services readily accessible on the corporate intranet, business users didn't seem to want to refer to it.

The problem was that their Service Catalog was merely a static reference document. End users could go to it to read about IT services, but they needed to link to another form or call the help desk to submit a request. The Service Catalog became just an extraneous step in the process.

Too many Service Catalog projects stop with publishing a document or posting it on the Web—these catalogs aren't used and they don't make an impact. A successful IT Service Catalog is accessible the moment your customers want to or need to think about IT. Here are a few tips:

- **Make it interactive.** Rather than presenting a super-set of all possible services and options, personalize the users' view of the Service Catalog based on their job function, location, and role.

- **Make it actionable.** End users should be able to place an order within the Service Catalog, and business executives should be able to reference the Service Catalog when they want to review their IT bill or make sourcing and budgeting decisions.

- **Keep them coming back.** Use the catalog to keep the business updated on IT consumption and service levels, and provide end users with the ability to check the online status of their requests.

Keep these principles in mind and you can overcome this pitfall and promote adoption. Otherwise, your Service Catalog is likely to gather dust on the virtual shelf.

Pitfall # 3:
Solving world hunger…

Many Service Catalog projects attempt to exhaustively document every service, service option, or permutation, with each associated activity, task, configuration item, and workflow, and end up…well…exhausted.

I've had a hard time keeping track of the number of Service Catalog projects I've heard about that start out as quick laboratory experiments and end up as multi-year research projects. Here are some symptoms you may be on the wrong track.

- Your catalog is in a Word or Excel document running hundreds of pages—it won't be read.

- The services you thought were fully documented changed before you were able to publish them—you're making it too complex.

- You started by documenting the back-end technologies, assets, and infrastructure—you're not customer-focused in your approach.

- You find yourself with flow diagrams that extend hundred of pages—trust me, it will not be used.

Don't let this happen to your project. Remember, "Perfect is the enemy of done."

Creating an actionable and successful Service Catalog may seem like a daunting task—but it doesn't need to be. Successful Service Catalog projects are pragmatic and focus on making high-return, customer-facing services accessible to your business users, in order to build credibility and make an impact.

Pitfall # 4:
A Service Catalog is just a front-end to the Service Desk …

Many failed Service Catalog projects start at the help desk. At first glance, the help desk may seem like a good place to start. Following ITIL guidelines, the Service Desk is the point of contact with your end users—for addressing any problems, complaints, or questions. But based on experience, it is clearly *not* the right place to start with your Service Catalog.

First of all, the service desk is designed around Incident Management to address service disruptions—whereas a Service Catalog should be focused on ongoing service operations and service agreements to support the business. Moreover, the Service Catalog encompasses more than just services associated with the traditional help desk. The purpose and scope are different, and the approach should be different as well.

Another challenge with the help desk approach is the interaction model. In an effort to make the Service Catalog actionable and transactional for end users, I often see service descriptions linked to a self-service help desk form. Unfortunately, these forms are typically designed based on a CTI (category-type-item) and trouble ticket structure.

The CTI structure works well for trained staff to quickly record and resolve incidents. But for business users, it is extremely cumbersome to choose from a pick list in a CTI structure; in many cases, they are faced with a series of cascading menus that fill the screen. End users simply refuse to adopt this self-service model; instead, they pick up the phone to call the help desk.

To succeed in making your Service Catalog actionable and user-friendly, you need to provide business users with an interface that they are familiar and comfortable with. Look to the leaders in e-commerce for ideas. Provide the same look and feel (e.g., search and browse, create a shopping cart) that users encounter when ordering products or services online.

It's a concept that I call "**YADU**": **Y**ahoo-like search and categorization, **A**mazon–like merchandising, **D**ell-like configuration and **U**PS-like tracking for services. The payback is faster adoption—and more immediate benefits—for your Service Catalog project.

Conclusion

I've seen many IT organizations that try to create Service Catalogs themselves make many of the same mistakes. Now that you know some of the common pitfalls, you can focus on how to ensure success with your Service Catalog initiative:

- define services from the perspective of the internal customer;
- segment internal customers and deliver differentiated, role-based content;
- make it transactional and actionable in nature; and
- provide users with a "look and feel" and experience that they are familiar with.

Implemented correctly, the Service Catalog can drive a fundamental change in the relationship between IT and the business. The Service Catalog can communicate how IT helps internal business customers and end users do their jobs. The Service Catalog sets realistic expectations with regards to deliverables, price, and performance metrics. Finally, a well-executed Service Catalog can help your IT organization to manage service demand, standardize service delivery, and improve service quality.

__Rodrigo Fernando Flores__ is the founder and chief technology officer of newScale, with more than 20 years experience in software development and IT management. He is a member of the IT Service Management Forum USA, and has advised several leading Fortune 500 companies in their ITIL and Service Catalog initiative.

Beyond the Mug and the Mousepad: Helping Employees Live your Brand

by Andy Kanefield and Mark Powers

Sales are lagging. Customer service scores are down. Morale is low. In general, your group seems out of sync. What is the prescription for what ails you? For one financial services company, the proposed remedy was to create a motivational theme and produce themed collateral with vibrant colors and stage what employees called a "pep rally."

This Dilbertesque vignette is the worst nightmare for many employees. Someone decides that people need a shot in the arm. So what happens next? People are recruited to plan a group "feel-good" event and roll out a promotional theme with mugs and mousepads (and if you're lucky, a baseball cap). While the issues that truly influence sales efforts, customer loyalty, and employee morale are neglected.

What can you as a manager do, when you know things need to change and all the mugs and mousepads in the world won't fix things? In the example cited above, management unfortunately decided to jump ahead to tactics that had no connection to the reality their employees faced everyday in their jobs.

We suggest taking a step back for a brand "checkup" that has three steps:

- Understand your brand.
- Help employees live your brand.
- Reinforce the brand at every opportunity.

Step 1.

The first thing we suggest is to understand your brand; that is, you need to understand who you are as an organization and how that relates to the experience of all of your stakeholders: customers, employees, and business partners. There are many ways in which people try to express what a "brand" is. For our purposes, we think of a brand as the experience your stakeholders have with your service or product.

When your organization makes claims to your customers, you're making a promise about your product or service. The promise might be that your product or service is the highest quality or the lowest price. The brand experience must match your promise because it is a reflection of who you are as a company, what you believe, and why stakeholders should trust you to follow through on your promise of value.

Your customers will always compare their experience with your promise. If you want the *experience* to match the *promise*, the promise must be authentic. The promise must be one that your organization is capable of delivering and that your employees believe they can deliver. If it isn't, everyone inside and outside the company will know it.

If you're not clear at this point that your promise is aligned with the experience of your stakeholders, don't move on to the next step. Instead, it's time to talk to senior management about how to align what you promise with what you can deliver.

Step 2.

Once you understand who you are as an organization and how that helps your customer, you want to make sure everyone on your team knows their part in delivering the promised experience or product and finds meaning in their role. Of course, that is often the primary challenge you have as a manager: helping people who are very different find meaning, and therefore be fully engaged in the part they play within your organization. Just as parents and teachers know you can't expect all children or students to respond in the same way to uniform delivery of instruction or information, managers shouldn't expect employees to respond in the same way to a one-size-fits-all approach to corporate communication.

What we have found is that there are ways to get a diverse group of people aligned with an organization's identity. The key is in recognizing how each person finds meaning in their work. Using information on how people learn and observations on how people find meaning in their jobs, we believe you can segment your employees into four main groups.

- ***Group 1:*** Some employees look first to see where the company is going. Is the direction of our company clear? Is it a direction with which I am comfortable? A member of a professional services firm recently commented that she was leaving the firm because she "didn't see a bright future." Where they were headed was more important to her than anything else. In her case, the firm may have had a bright future; they just hadn't clearly articulated it. Make sure that your employees have a clear and vivid picture of the direction in which your company is headed and the benefits if everyone lives the brand.

- ***Group 2:*** Others look first to the connections and relationships among their co-workers. If they are among a group of people with whom they fit, they find the meaning they need. Do I share the same beliefs and have the same norms as the people with whom I work? After a merger, a senior leader remarked that she missed the connections that used to exist among the senior leadership. She no longer knew what was happening because relationships had changed. It was harder for her to know how she fit within the new organization. Make sure your employees know how they fit. Provide opportunities for them to connect with other employees. Provide opportunities to know what is happening within the rest of the company.

- ***Group 3:*** Some employees think primarily about the mechanics of getting the job done. They find meaning in completing their to-do list; execution is the name of the game. These employees will be helped with clear, concrete steps that demonstrate the brand. Making sure that employees have sufficient training on company processes will help this segment of your employee population. In referring to the distinction between those who set direction and those who get things done, one senior staff member referred to "technical executors" as being those who say, "Tell me what to do and I'll get it done."

- ***Group 4:*** Finally, some employees think first about the behavior of key influencers within the company. They continually assess whether leaders are walking the talk. When we make a claim or a promise to a customer, do we back it up with our personal behavior? You help these employees by clarifying with senior management the key messages they want to send and providing behavioral examples of managers living up to their claims. A leader recently commented that when he looks at the documents of their company, he says, "Who wouldn't love it?" But when it comes to "the rubber meeting the road, it's a little different." For some employees, that will be their most important criteria for being engaged in living your brand.

Step 3.

Making sure that employees live the brand consistently requires continual reinforcement. And reinforcing behavior requires significant time and diligence. It is essential that the four employee segments mentioned above continually receive affirmation of what they care about most.

If you continually reinforce what employees know to be true, they will see you're doing more than paying lip service to the claims of who you are as a company. As a result, over time, you'll have a living, authentic identity that customers can relate to and employees are excited about.

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Mark Powers *has been a consultant with Dialect since 2004. Prior to that he worked in financial services and as a career/family counselor providing assistance to relocating families employed by multinational companies. In addition, Mark has taught English as a foreign language and served as a team leader for a non-profit organization in Moscow, Russia and worked as an electronics engineer. Mark earned his B.S. in Electrical Engineering from the University of Illinois, graduated with an M.A. in Counseling from Covenant Theological Seminary, and received a Certificate in Teaching English as a Foreign Language to Adults from the Royal Society of Arts/Cambridge University.*

Going Global with

by **Phil Verghis**, ***President***, *The Verghis Group, Inc.*

In this second of two articles, global support guru Phil Verghis continues walking you through a simplified series of steps a support executive might take as he or she examines issues to consider when locating a support center in the Asia Pacific region. In the first article, Phil explained the kinds of information you need to gather as you make a decision about expanding support far across the globe.

Summary of What You've Learned

By following the steps in the last article, you've gathered a lot of information in a remarkably short period of time. You've learned that expanding in the Asia-Pacific region is a high priority for your company and its sales leadership. You have talked to sales and found that they would strongly prefer support to be in the same physical location, since support staff are often required to go on-site to visit customers. In terms of language capabilities, their top priority is Mandarin Chinese, with Japanese a close second. They would prefer a support team with sales knowledge as well as some technical knowledge. That's because in many Asian countries, support people are also involved in presales activities and account management post-sales.

Support – Part II

Independently, you find out that customers and prospects would prefer support to be available in their local languages. But their highest priorities are responsiveness and availability of support (without time-consuming escalations) outside normal U.S. business hours.

You discovered that Business Development is already negotiating with a reseller, so it was a good idea to talk to them after all. They hadn't planned to put too much into the support contract beyond, "Reseller will provide frontline support."

Because your Human Resources, IT, and Legal Departments are pretty strapped in terms of time and resources, they would strongly prefer that you co-locate in a region where a sales office already exists.

What You Want

For some time now, you have resisted taking on global support responsibilities—there's simply not enough time! Your company is based in the U.S., but sales outside the U.S. (primarily Europe) have grown to 25 percent of revenue, and there is a clear push to penetrate into Asia Pacific. Up to now, each sales region in your company had provided its own support, and it seems to work. Sure, there are the occasional service hiccups that flare up, but nothing unexpected.

At the same time, however, your large enterprise customers have told you that they want their support experience to be consistent across the globe and they want 24 x 7 support. The 24 x 7 support requests have been hard on your team, particularly since after-hours escalations have increased. These are all pretty clear signs that a more uniform kind of support model is needed. But which kind?

Global Support Models

It's time to step back for a moment and briefly consider some common global support models. As a support executive, of course, you must always look at the entire customer experience from the customer's point of view. This is particularly important when dealing with international customers.

As I note in my book , *The Ultimate Customer Support Executive* (available in the HDI bookstore), there are a number of ways to configure customer service so that it takes good care of your international customers. *The key is to create a balance between global consistency and local responsiveness*. This balance is likely to change over time by the way, and that is okay.

Centralized Support Model

In this first model, authority is concentrated in one location, usually at the company headquarters. A clear chain of command flows up to a high-level support executive who has ultimate accountability for all global support issues. For very small support organizations, this could mean that worldwide support is handled by staff in just one country. There may not be support locations or support staff in any other parts of the world.

But larger organizations generally have local support offices in several locations. For these organizations, a centralized support model typically means that local staff handles the relatively small number of calls coming in from their own geographic region, but does not provide after-hours support. That's handled by the headquarters support team. If your remote support groups are large enough, centralized support usually morphs into a *Follow the Sun* or a *Regional Hubs* model.

Like everything else, a centralized support model has its advantages and disadvantages. Let's look at each.

Centralized Support Pros

- Centralized decision-making, so there is less confusion over who does what.
- Faster decision-making, since there are far fewer negotiations among support leaders in different geographic regions.
- Typically, a single set of tools is used by everyone, which makes it easier for support people to maintain a holistic view of the customer.
- Common support contracts and offerings, which are better for customers.

Centralized Support Cons

- Difficult to offer support that's truly customized for local needs, both in terms of the hours of coverage as well as languages offered. Support languages are typically limited to the languages spoken by support staff.
- Can alienate customers or prospects in areas where need for local support is acute due to cultural or linguistic requirements (e.g., Korea, Japan, France).

Follow the Sun Model

In this model, multiple support centers around the world coordinate service to provide business-hours support to their local customers, and off-hours support to the rest of the company's customers. This enables a company to provide 24 x 7 live support without requiring any one location to be staffed 24 x 7.

Here's a typical example. A U.S. East Coast office answers calls during its workday, and at the same time provides off-hours support to other regions whose offices are closed. When the East Coast staff goes home for the night, the U.S. West Coast office takes over. Later, the Indian office takes over from the U.S. West Coast office, and the European office picks up after the Indian office shuts down. Later, Europe hands off support responsibility back to the U.S. East Coast office.

This model might seem complicated, but it can actually be implemented without a large staff in each region. It does require tight integration between various back-office systems, and highly coordinated processes to allow for a seamless handoff between different support groups.

This model typically works well when there is a strong executive with global responsibilities, i.e., a centralized support model.

If you have enough staff, a popular variation is "regional hubs." With this model, each regional hub acts like a local head office for support in that region, and gives regional customers the unique support they need. In this model, you might have pan-European support coming out of your Irish office, for example, and Far Eastern support out of Singapore or Australia. This model delivers economies of scale (enough support people for backup, training, and learning) within each region.

Follow the Sun/Regional Hubs Pros

- Off-hours support is covered by an office that is already scheduled to work.
- Around-the-clock work on customer issues, by handing them off between support teams.
- Staff works standard business hours, rather than second and third shifts.
- Standardized systems and processes.
- Common tools around the world.
- Consistent training across the globe.
- Greater flexibility for each local unit, even with all this standardization.
- Excellent for disaster recovery.

Follow the Sun/Regional Hubs Cons

- More expensive to setup, though VoIP systems are dramatically driving down costs.
- Difficult to convince local sales offices to give up some of their local-only support for the greater good.
- Coordinating far-flung groups can be complex.
- Requires strong leadership and trust among different units.
- More than one staff member is typically required at each location, to avoid shift coverage issues.
- Language skills must be excellent, particularly if staffers whose primary language is not English will be providing support to people in another region whose primary language is also not English.

Decentralized Model

In the decentralized model, no one person or unit has ultimate authority over support decisions. Instead, authority is distributed among different support entities.

This model often reflects a company's corporate philosophy, and is often implemented after mergers and acquisitions. It is also common when the parent company has a decentralized model with independent business units, and each local unit runs as an independent operation.

In the decentralized model, support leadership in each country is usually provided by local sales executives, and thus can differ quite a bit among regions.

Decentralized Pros

- Far more responsive to local sales needs.
- Staff feels personally accountable for the success of their customers.

Decentralized Cons

- Potentially the most wasteful of support setups, with duplication of tools, inconsistent procedures, etc.
- Can be difficult for global customers due to inconsistent support contracts, different escalation policies, etc.
- Local offices often choose systems and policies that make sense for them, but result in a sub-optimal experience overall for the customer.
- Training, if any, is done independently, which can result in inconsistent customer experiences.

Narrowing It Down

Thanks to that timely conversation with Business Development, it also became clear that you have to set up a series of meetings with the proposed reseller to discuss training, expectations, escalations, etc. as they were contractually obligated to provide frontline support. After all, it is your company's reputation on the line even when the reseller answers questions on your behalf.

For our hypothetical situation, the final decision was for the U.S. based support executive (where headquarters was) to take ultimate ownership of the support experience, with a lot of input from the local sales regions where unofficial support was being done. With accountability firmly in the hands of one support executive, the next logical step was to setup a regional hub model, in this case in Singapore (which had a regional sales office). Singapore's Economic Development Board helped subsidize the deal.

This model kept as much of the support as possible within the local region, with backup provided by the central support team.

Conclusion

In my opinion, support should be centrally managed, but locally distributed. This is the best of both worlds. One individual is accountable for global service and support, yet implementation is very responsive to local needs.

In general, the model that best fits this description is the regional hubs model, but by no means is it the only "right" way. If you choose this method, make sure that all regions and localities are given the chance to participate and share ideas.

Once you get started with your new global support responsibilities, get ready for an exhilarating, frustrating, and ultimately very rewarding experience!

Phil Verghis *is the President of The Verghis Group, Inc., a global service delivery firm based in Cambridge, MA. He is the author of the highly acclaimed book* ***The Ultimate Customer Support Executive****, available from the HDI bookstore, and a past chairman of the Strategic Advisory Board of HDI.* ***www.verghisgroup.com.***

Book Review for *The Ultimate Customer Support Executive*

The technical support industry has grown by leaps and bounds in the last twenty-years, but one of the aspects of the support industry that has not kept pace with this growth are books written for our executives in this era of business alignment. What has always been lacking is a detailed, well organized, fun and readable book designed for support executives. What Phil Verghis has done in *The Ultimate Customer Support Executive* is to capture the complexity, the excitement, the problems, and the solutions that make up the support executive's working life. The first third of the book covers the topics of leadership, organizational mission, the wonderful world of customers, and common myths about customer support, in a way that offers an excellent introduction for new support executives and a great reminder for seasoned professionals. The second third of the book deals with the challenges of understanding process frameworks and the technology of customer support. The final third of the book is the most satisfying. These chapters discuss the challenges of global support, offshoring, being recognized as a professional, and the future of support. The appendix is also very good and offers the best single description of quality standards (ISO 9000, CMM-I, BS 15000 and 7799, and COBIT) I've seen anywhere. Combined with clear writing and years of experience in the customer support industry, this book will quickly become a "must have" in every executive's library.

You can purchase this book from the HDI bookstore. Visit us online at ***www.ThinkHDI.com.***

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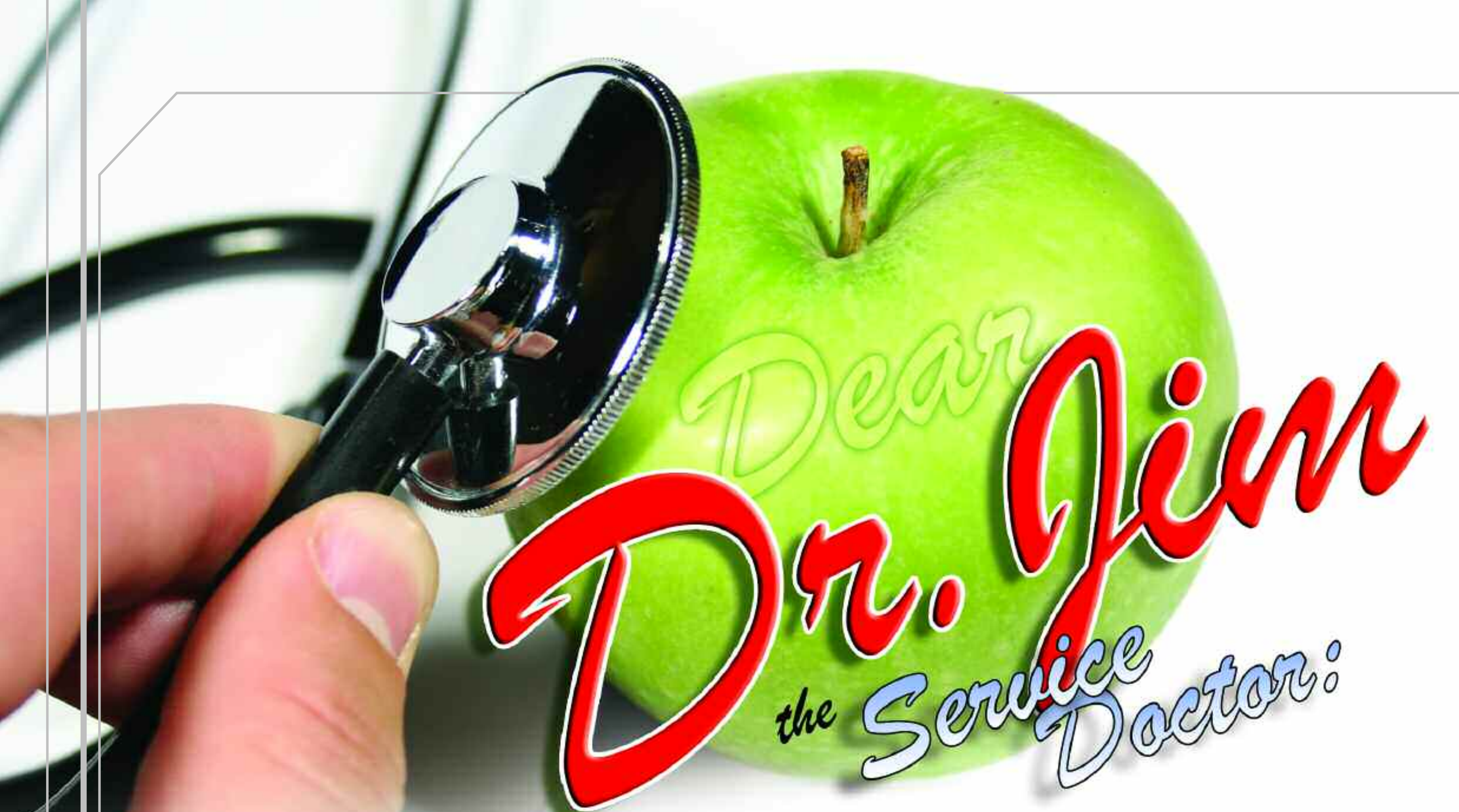
Lori Hertzog
Sean Hill
Thomas Hollenbeck
William Humen
Kevin Jackson
Thoris James
Tikita Johnson
Anita Jones
Donna Jones
Fred Jones
Tiffany Kady
Camden Kent Jr
Wyatt Kern
Christopher Kloecker
Steven Koelbel
Tammy Kuhlow
Jean Lau
Lynette Liepert
Gregory Litchney
Michel Lorrain
Doris Luckie
Gary Lutz
Teresa Majette
Michael Manzenberger
Brian McDonald
Carolyn McKinnon
Jason McKolay
Austin Miller
Jay Miller
Trevor Miller
Michelle Mims
Crystal Mohr
Rajpal Nanray
Andrew Nemecek
Brent Norway
James Nuckolls
Kellysue Nyikos
Jaimie Ortiz
Misty-Joy Pagliarini
Kim Pfeifle
William Phan
Christian Pilon
Todd Price
Tommy Reynolds
Natalie Rochon
Duane Rorick
Joshua Roth
Patricia Rotondo
Theodore Rubin
Mireille Schellinger
Eloy Sedillo
Issam Sharif
Irene Shick
Diana Sina
Judith Sloan
Lacresha Smith
Martin Smith
Phyllis Smith
Darren Stewart
Jeannie Sweitzer
Alexander Taylor
Christine Teerlinck
Eric Thomas
Adegoke Tijani
Sherrell Treadwell
Quita Upshaw
Matthew Urbancik
Danisha Watkins
Carmella Williams
Paul Willy
Joyce Wilson
Russell Wolff
Rebecca Young



Jim McKennan, aka Dr. Jim the Service Doctor is often recognized for his highly developed customer service skills as well as being an adept call center manager, speaker, and award winning sales and IT professional. He is a Senior Consultant with Pink Elephant. Jim is a member of the Sacramento, CA chapter of HDI and is currently chapter President. He is also the past Western Region Director of the Member Advisory Board for HDI and is on the Support Center Certification Standards Committee for HDI. Jim has a BA in psychology from California State University.

Dear Dr Jim,

My team at the service desk escalates a lot of incidents to second and third level support teams, but sometimes we don't get the kind of response times that I think our callers are expecting. Often the callers phone us two and three times looking for a resolution. How can I get the second and third level teams to respond to us in a timelier manner? We are spending a lot of time apologizing and handling the same calls over and over. This starts clogging up our call queue and forces other callers to have longer wait times than would be necessary if we could just get faster responses when we escalated incidents. Help me out here. I am frustrated, my employees are frustrated, and our callers are frustrated!

Frustrated in Foxboro.

Dear Frustrated,

Sounds like you have a lot of issues here that need attention and solutions. Where do we start?

All the extra calls are costing your company a lot of money in unnecessary support costs. Additionally, all the lost productivity of the callers must be adding cost and loss of revenue to the company as well. This means that this is not just your issue, but is an organizational issue that negatively affects your company in several ways.

It appears that the second and third level support teams have no incentive to respond more quickly, nor are there any consequences when they don't. Have you sat down with the managers of the other support teams to discuss your situation? If not, they may not know the scope of these issues. This might be a good place to start. So, after you've done a little homework, plan a meeting with the other support managers.

Using your incident management software tool, gather some information in a few simple reports that can help you explain the situation to them. For example, find out how many extra follow-up calls are generated by the callers for issues that you escalate. Now, extrapolate how much these calls cost based on your average cost per call (you do calculate this regularly don't you?). Next, figure out the average time to resolve on all escalated incidents, preferably by support group.

It also appears that you do not have any Service Level Agreements or Operational Level Agreements in place (shame-shame). These would make this whole situation a lot easier to manage. But absent these agreements there is still some hope. However, you at least have to get a rough idea of what the callers' expectations are. You will need to meet with or talk to a representative sampling of department managers from the rest of your company. Find out what kinds of response times they need to meet their business objectives. You will then share this with the second and third level support managers.

When you meet with the second and third level support managers, they need to tell you what is a reasonable expectation on how fast they can resolve issues that you escalate to them. Somehow you need to marry up the needs of the business with the capabilities of the support organization. This is really the domain of Service Level Agreements and Operational Level Agreements. But since they do not yet exist, you can proactively take action in the interim to alleviate this issue until Service Level Management is deployed in your organization. [Service Level Management is one of the key processes recommended in the Information Technology Infrastructure Library (ITIL)].

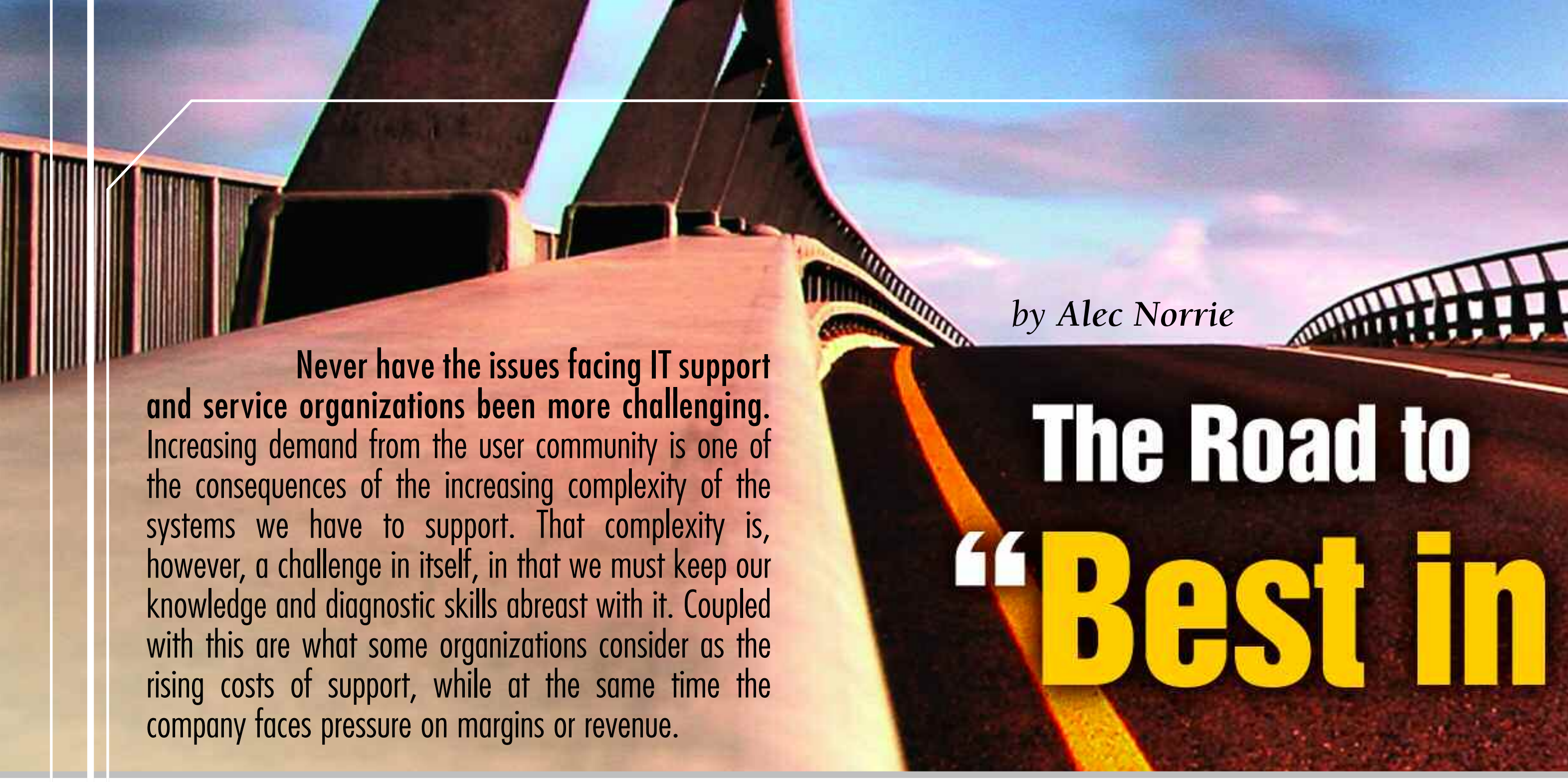
Share with them the reports mentioned above so they understand the current response times and the costs for the additional calls. Then discuss with them what you have learned from your meetings with the customer groups. With this information, you will hopefully be able to establish a verbal agreement with second and third level support to reduce the average time to resolve after escalation in order to meet the business needs of the organization.

At the very least, you will uncover the real reason for the "extended" response times. It is either due to lack of understanding and would entail better communication and time management by second and third level support or you may discover that there is not enough current staff in second and third level support to meet the needs of the company. Either way, once uncovered these can be more directly addressed to better meet the needs of the business.

Once the meetings have concluded and you have a semblance of verbal agreements, you will need to monitor the escalations and report back to both the caller groups and the support groups regarding the actual performance of the support teams. You can then compare these results against the statistics you gathered prior to conducting the meetings.

From this point on, you need to capture performance statistics regularly and share them with the support teams and the business. I think you will find that the support teams will not want to be portrayed in a bad light (in the reports) and will make every effort to perform at a level that will meet the needs specified in the verbal agreements you have facilitated.

In the meantime, you have taken some important steps in initiating Service Level Management. However, there is a lot more work ahead for Service Level Management to become a successful process in your company. You should do some investigating and research about Service Level Management (and the other ITIL processes) that may help your IT organization more effectively and efficiently deliver services to your company and enable them to better meet their business objectives.



The Road to "Best in

by Alec Norrie

Never have the issues facing IT support and service organizations been more challenging. Increasing demand from the user community is one of the consequences of the increasing complexity of the systems we have to support. That complexity is, however, a challenge in itself, in that we must keep our knowledge and diagnostic skills abreast with it. Coupled with this are what some organizations consider as the rising costs of support, while at the same time the company faces pressure on margins or revenue.

Most organizations respond to these four pressures by searching for "silver bullet" tools to solve their problems; or by trying to manage the budget, for example, by consolidating service groups and/or services; and even attempting to shift the burden by out-sourcing, near-sourcing, or off-shoring services to remove headaches; or indeed a combination of all of the above!

Reasons for Failure

There are many reasons why these attempts can fail. Chief among these are the difficulty of gaining approval for sufficient funding to properly plan and implement tools; the departure through natural staff movements; the lack of investment in the internal expertise needed to devote to program implementation; the lack of staff commitment to necessary changes; and the failure to take into account initial and changing customer requirements.

The end result of all this can be especially discouraging. In the short term, any planned return on investment may never be achieved. The long-term effects must also not be ignored. Internally, long-term effects may include lost credibility and support for future projects and a demoralized staff, possibly leading to increased turnover. There are external impacts too, including the risk of growing dissatisfaction in the customer base and disjointed operations with a lack of control and accountability.

The bottom line is that failures and false starts do nothing more than further increase the pressure the attempts were meant to relieve.

I advocate that we stop looking for that one magical cure to solve our service problems. It doesn't exist! Sustained success comes from the combination of motivated people, proper process, and necessary technology. One way to success is to adopt a standards-based best-in-class service delivery strategy that will ensure you have people, process, and technology in balance. As President of an HDI chapter, I am inclined to prefer HDI's Support Center Certification Standards as a viable approach to that strategy.

Defining Criteria

The standards themselves, and the strategy that underlies them, were developed by industry practitioners (independent and corporate based) for best-in-class service. They are aimed at defining criteria for ensuring consistency, reliability, and improving service operations. They establish management and delivery practices to enable desired results, while incorporating principles for continuous improvement, to keep pace with changing demands or competition. Best of all, the standards themselves are free, offering a payback for the implementation effort and perhaps even industry recognition where standards adoption is extensive.

Seven Steps

The service value of the standard increases over time, as seven steps are traversed. The first of these is **Leadership**, which means providing visible support and encouragement to individuals and teams, communicating and promoting purpose throughout the entire organization, while inspiring an environment of cooperation and enthusiasm while resolving resource and priority issues. A benefit of leadership is ensuring the organization is delivering required services, and not operating as an island, so that you have the backing necessary to evolve and improve your support organization. That aids in obtaining cross-functional

Class” Service

cooperation when resolving issues and also helps inspire and motivate employees and alleviates some of the fear that routinely accompanies change.

Next comes **Strategy and Policy**, which means having an identified mission and vision that supports the business purpose of the enterprise, establishing plans that define how organizational objectives will be reached, and developing measurable goals and tracking mechanisms. Through Strategy and Policy, employees come to understand and support priorities for your organization, making change and management easier. Customers and stakeholders may see and support your objectives, improving their satisfaction and your ability to succeed. Another benefit is a consistent direction for the support organization and an improved sense of accomplishment for all involved.

This leads to step three, the vital area of **People Management**. Here we are creating an environment that motivates people to perform at their peak, enabling them by identifying and maintaining the skills required by management, and ensuring they know what is expected by giving them regular feedback and recognition. When this is done properly, it can increase productivity as barriers to performance are cleared. It may also minimize conflict, as staff will understand what is required of them. Reduced, unplanned staff turnover may be one beneficial effect, while also making it easier to attract new staff to the support organization. It benefits managers too, by reducing that part of their burden of responsibility.

Step four is **Resource Management**. This means ensuring the support organization has the resources and tools necessary to achieve its objectives. Naturally, that includes financial, human, physical facilities, infrastructure, organizational knowledge, and competencies. But it is not just the presence of tools, but also ensuring their quality and adequacy rather than just making do with an almost-fit. There is an ROI effect here, as a properly implemented tool improves the results from the capital expenditure on it. The match of the tool to real-life processes increases staff productivity and decreases frustration. The customer experience is also improved as the technology matches customer expectations. A higher quality of tool means more stability in the operating environment, thus decreasing problem resolution times.

At the next level, we arrive at **Process and Procedures**. This calls for well defined, documented, and communicated procedures for requesting service, managing incidents, and handling change. Definition and documentation are not enough. Following existing procedures and providing consistent, predictable service to customers is a given, and the process is completed by encouraging feedback and making continuous improvements. This step improves our ability to meet customer expectations, decreases the time spent managing exceptions, reduces time and effort to train new staff, and improves our ability to effect change with minimal disruption.

Next, we look at the **Results of Our Efforts**. That means gathering, analyzing, and reporting our performance and demonstrating the ability to consistently meet goals for the previous five steps. The scope of this element covers both people and customer satisfaction along with operational performance. Results consideration at this level establishes a baseline to gauge the impact of changes and supports benchmarking against industry standards. Simultaneously it provides performance feedback to staff and customers, while facilitating continuous improvement programs.

If all of the steps above were done in the hopes of seeking recognition as an HDI-certified support center, the seventh and final element would be **Validation**. This is formal verification that best-in-class practices are in place and that performance is being met or exceeded. The scoring process used is weighted against standards and the level of maturity attained.

The key messages to be aware of in considering moving toward best-in-class are that the use of external industry expertise assists in determining and validating any shortcomings and brings an outside perspective. Leadership and vision are at the root of enabling the organization to be successful. All participants must genuinely accept that change is inevitable—this includes those at management level because following the road to best-in-class ensures that management has its house in order before rallying the troops. It affects everybody, not just those who deliver service. The entire organization must understand the standards and expectations in order for improvement to be successful.

(*This article first appeared in the* Bruton Consultancy *Magazine. ITServices.com*)

__Alec Norrie__, of RADAR Solutions Group, Inc., is a senior manager with over 30 years experience in a wide variety of customer service roles in the computer industry. He has extensive knowledge in managing teams responsible for call center and help desk services both in North and South America. President of the Ottawa chapter of the HDI, he is a regular speaker at HDI chapter meetings and regional events in North America and in the U.K.

by ***Marv Waschke***

The IT Infrastructure Library (ITIL), developed in the late 1980s by the United Kingdom's Office of Government Commerce, has not only gained widespread adoption as an integrated set of accepted best practices for companies seeking improved IT processes that better align their IT services to meet their business needs, but it has also given birth to a new generation of service desk technicians.

ITIL Spurs New Generation of Service Desk Technicians

The old service desk technician, like the Swiss army knife, was reliable, diversified, indispensable, but seldom had just the right tool for the job. Not so with the newer generation.

Prior to ITIL, service desks tended to be unstructured. Employees called the help desk whenever they had a problem or issue, and the response level was determined by how convincingly (or not) the employee persuaded the service desk technician that his or her issue was critical. A service desk technician then assigned a grade from level one to three—depending on the outcome of the call—with three being most critical. In many instances, only a call from the CEO would warrant getting an issue assigned a level three.

ITIL organizes the service desk very differently, and consequently has different expectations for service desk technicians. ITIL divides the old service desk tasks into two buckets: Incident Management and Problem Management. Change Management is a practice that often falls under non-ITIL service desks with a completely different set of goals.

Incident Management is all about urgency: service technicians need to get the system up and running and get it online now. Never mind looking for root causes, doing intricate repairs or providing permanent fixes. A good incident manager lives on adrenalin, a quick wit, and MacGyver-like instincts combined with major resourcefulness.

While Problem Management is not as urgent, it is no less demanding. By the time an issue arrives in the Problem Management queue, the incident may have already been resolved through a backup system or some other expedient way, but the underlying problem may still need to be addressed. In the meantime, the problem manager examines similar incidents and ponders the root cause; the goal being to identify and implement the best possible solution.

ITIL has changed management's view of the service desk. In a typical service desk scenario, the support manager approached the CIO around budget time armed with statistics on the number of issues opened, the number of issues closed on the first call, the amount of time spent on average for each issue, and so on. These measurements were based on the support process. The CIO would then determine what impact these statistics had on the organization as a whole.

From an ITIL perspective, Incident and Problem Management are viewed as part of an entire IT process rather than separate entities. While the old statistics have not been overlooked, the service desk technician must now consider new measurements such as the basics of maintenance, mean time between failure (MTBF), and mean time to repair (MTTR) or mean time to return to service—all of which more accurately measure the true effectiveness of the service desk as a contributor in maintaining the infrastructure and IT systems.

For executive management, this sheds a new light on the service desk technician. In the old example, the emphasis was on the service provided to individual employees. The ITIL methodology emphasizes the effectiveness of the service desk in maintaining organizational efficiency, which changes the nature of the service desk technician's job altogether.

The ITIL-focused technician is more concerned with issues involving the system, like restoring service and resolving issues and problems, and less concerned with the staffing concerns involved in shrinking issues in a support queue.

Some service desk technicians believe that making the distinction between an incident and a problem has made things easier. Too often, in a traditional service desk, they found themselves being pulled in two directions: between solving the underlying problem (which can get in the way of restoring service) and restoring service on a recurring problem (which can get in the way of finding a solution).

ITIL separates service restoration and problem solving and clarifies the procedure for dealing with issues. A routine review of critical issues gets shorter and less acrimonious when incidents and problems are clearly differentiated. For incidents, the question is, “Has the service been restored yet? If not, then when?” The discussion is not clouded by finger pointing but rather, the focus is on restoring service.

At a site with an ITIL-based Change Management practice (as well as Incident and Change Management); routine problem and incident review are even more regulated. In non-ITIL shops, the service desk level two or level three technicians are often responsible for making changes to the system, restoring service, and diagnosing problems.

ITIL change management follows a set process for reviewing changes before they are implemented and relies upon a Configuration Management Database where the configuration can be reviewed prior to the change and recorded when executed.

When making changes, diagnosing problems and restoring service are compressed into a single task, resulting in a high probability that none of these functions will be executed properly. In an attempt to save time, a technician may be tempted to make a rash diagnosis, throw in a change, and restore service. This isn’t efficient and might produce less than optimal results, but it forces service restoration to be dependent on an accurate diagnosis and correctly executes the change. It is difficult to diagnose a problem and execute change for service restoration under pressure. Restoration is slowed as the problem determination and change are repeated; increasing the probability that the issue will recur since it was not adequately repaired.

Service desk technicians experienced in dealing with critical system support issues are familiar with this phenomenon. In a critical outage, seasoned managers lean towards slowing down the process to prevent errors. By placing the emphasis first on service restoration, followed by methodical research and controlled system change, the new generation of service desk technician implements ITIL best practices to resolve the situation and deliver value.

ITIL has spurned a new generation of service desk technicians. Some welcome a new opportunity to play a more dedicated role in a well thought out services practice, while others may mourn the passing of the lone service desk ‘cowboy’ who wrangled with support issues.

Service desk technicians are measured in terms of their overall effectiveness on the IT organization, infrastructure, and systems, as well as related queues. But, as the service desk comes into its own as a recognized contributor critical to the overall well being of the organization, this new generation of technicians can appreciate a new found sense of value and respect.

Marvin Waschke *is a senior technology strategist at CA, where he participates in the design and development of service management applications. He is the chairman of the Distributed Management Task Force (DMTF) Support Working Group and previously sat on the Network Management Forum committee for telecommunications trouble ticket transfer standards for Legent Corporation. Marvin has masters and bachelor’s degrees in history and the social sciences from the University of Chicago where he specialized in the analysis of business and government organizations.*

The Cost of Customization

A significant proportion of businesses are wasting money maintaining customized proprietary applications to manage generic business functions.

According to Compass data, nearly a third of all organizations still use customized in-house applications rather than the alternative of packaged solutions. For basic financial and administrative processes, proprietary applications can be up to 66 percent more expensive to maintain than packaged apps. For payroll, pensions, and HR functions, in-house applications can cost 20 percent more to maintain.

"[Packaged applications are] able to support commodity requirements of small as well as large companies at a fraction of the operational costs that companies are paying to maintain applications themselves," says Martin Tennant, who heads the application development and maintenance practice for Compass' UK office. "Even with the significant up-front investment required to introduce such solutions, pay-back periods are being measured in months rather than years."

The increasing complexity of regulatory requirements is a key driver of the high cost of in-house software. "The amount of new code required to keep up with regulatory change in the HR and Finance arenas is making the cost of supporting proprietary applications prohibitive," says Tennant. "Further, we are seeing an increasing level of errors being generated by creaky applications that have undergone many alterations and, in some cases, have been running for as many as 30 years."

—*Compass Fact Based Consulting*

"Sorry, I can't remember my 11:00 am password. Can we discuss your plan to further improve security anyway?"

The Wonderful World of HELP DESK HUMOR

Source: **http://www.phonephunnies.com**

I Just Don't Understand this New-Fangled Contraption!

My sister works for a mobile phone company.
She e-mailed me right after the call.

Caller: I bought a phone last week, and I didn't receive the car charger for the lighter until today. I'm trying to use it, and it's not working. How do you use it?

Rep: First, you remove the lighter and then you plug it into the adapter.

Caller: But…I don't have a car.

Rep: Why do you need the car charger?

Caller: To light my cigarettes.

After some probing, the rep learned the member thought she could plug the charger into the phone and use it as a cigarette lighter.

Source: **http://rinkworks.com/stupid**

I work in the technical support department for a national ISP. One day, I was listening to the conversation of a tech next to me talking to a very frustrated woman. Apparently she had been having trouble getting online with our software, and the previous tech had her go into Dial-up Networking to create a new connection and get her online, so she could then download our software. That, amazingly, had been successful, but she was calling back to complain that when she had finished downloading the software and opened the CDROM drive, there was nothing in there.

The tech replied, in his thick Australian accent, "Ma'am, this is not a vending machine."

Many people have called to ask where the "any" key is on their keyboards when the "Press Any Key" message is displayed.

Proactive IT–Detecting Pro

New Advances in Technology

For today's IT infrastructure to thrive, your network and systems must be proactive. New advances in technology can help prevent outages, eliminate or mitigate the root causes of problems, and reach and maintain levels of performance and availability that are essential for an organization's success and growth. Tasks normally performed within IT and service desks continue to become automated, solving many problems before they occur.

In relation to the service desk, how is proactive software decreasing costs and increasing customer satisfaction?

Carl Grieves, Senior Vice President, Touchpaper

With improvements in technology, many customers have moved from a simple help desk, to a Consolidated Service Desk (CSD), to complete and integrated IT Service Management solutions, decreasing costs and increasing customer satisfaction along the way. One way that ITSM technology has decreased costs is through more effective management of IT spending and utilization of existing assets, including: re-use and sharing of services, servers, middleware, and network infrastructure, customer data, and databases. This is accomplished with a Configuration Management Database. The biggest cost reduction, however is gained through productivity improvements: reducing end-user down time, automating self-help, and enabling analysts with tools and information that allow them to diagnose and solve more complex or systemic problems quickly.

Customer satisfaction, whether external customers or internal employees, is increased by service desk technology that allows them to access needed information when (any time of day or night) and where (remote and mobile access) they need it, with the ability to quickly resolve simple issues themselves, rather than wait online or for a return call. Systems designed with user-friendly "smart" interfaces, automatic user authentication, role-based functionality, and sophisticated knowledge bases, reduce the amount of time customers take to get problems solved, and the result is increased satisfaction. Intelligent, browser-based services that can resolve issues, provide status information, and manage service calls, are available to employees and customers through a range of different access devices such as mobile phones, PCs or laptop PCs.

blems Before They Happen

Mark Angel,
Chief Technology Officer, Knova Software
Companies leverage Service Resolution Management (SRM) applications and technology to provide proactive service within the help desk. SRM enables this by deeply embedding search and knowledge in the business process to extend and enhance incident management systems.

By automating the resolution process across multiple channels, including contact centers, help desks, e-mail and self-service sites, SRM helps to reduce escalations and divert calls to self-service. Specific differentiators include:

- **Universal Knowledge Access—**a robust NLP search and classification engine unites disparate knowledge sources and unstructured content from across the enterprise.
- **Adaptive User Experience—**based upon the context of the query or case, a business process engine guides the user to the optimal resolution.
- **Integration with Remote Diagnostics—**pushing resolutions to the user and providing proactive notifications is achieved through integration with remote diagnostic tools such as SupportSoft and Control-F1.
- **Proactive Service Delivery Across Channels—**leveraging a common knowledge backbone, SRM applications provide seamless escalation and process support across channels.
- **Robust Analytics—**tracking user behavior and root cause analysis proactively drives improvements in processes and technology.
- **ITSM/ITIL Compatibility—**a knowledge-empowered SRM initiative helps meet the ITIL goals of capturing, using, and disseminating knowledge.

This integrated approach to service resolution lowers costs by shortening call handle times and allowing agents to close more issues at first contact. Overall, it leads to a more seamless user experience that isn't attainable with previous point technologies.

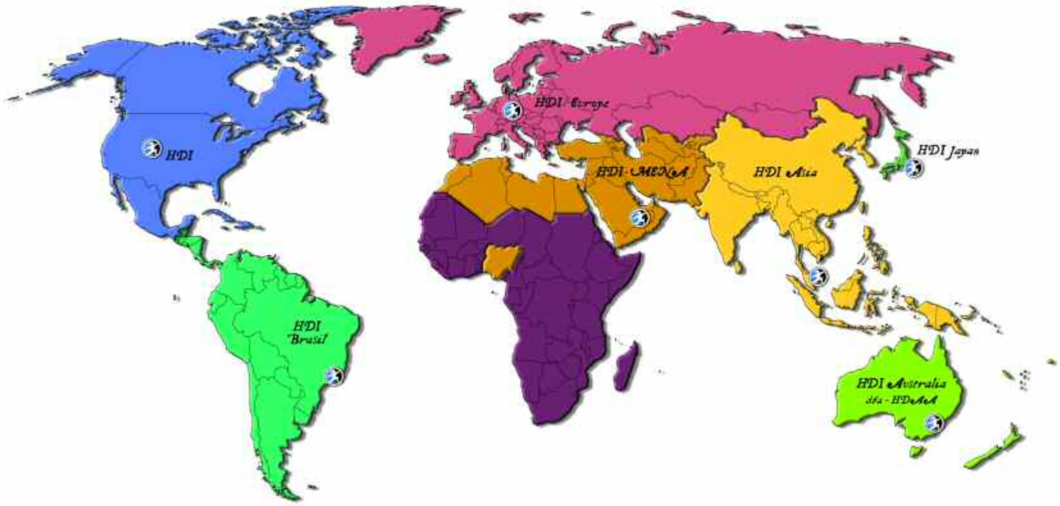
Michael Lehane Ph.D,
Senior Product Manger, SupportSoft
More companies are recognizing that for IT services to be a competitive advantage, their technology has to be up and running—simply, consistently, and reliably. Service automation software is evolving to make the real-time enterprise a business reality. Automated solutions for proactive support, self-service, and assisted service can enable companies to drive productivity and cost reduction in a flat IT spending environment. Moving costs downward through preventative or self-healing modes will be essential for any enterprise. The alternative is cost-prohibitive. Industry research indicates that dispatching a high-end service desk specialist to a remote location costs on average $254; on-site support is $108; and telephone support is pegged at $24. Contrast these costs with issues resolved through an automated, Web-based self-service channel, which costs less than a dollar. And with self-healing tools, it's mere pennies. Now, the key question: When and how will your organization automate? Or are you waiting for your competition to make the first move?

Turning reactive support into proactive support isn't a vision, it's a reality for forward-looking companies worldwide. With the pace of technology change increasing, it's not a question of "if" but "when" a company should standardize on a support automation framework for IT service delivery.

As businesses push to reduce service desk expense and enhance employee productivity, they also know that an efficient service desk can contribute to increased customer satisfaction. As one Fortune 500 CIO expressed it recently relative to his own company's support needs, "The choice is simple. Automate or perish!"

HDI Expands Global Reach

As the world's largest membership association for IT service and support professionals, HDI's knowledge and understanding of the support industry already cuts across cultural and geographic boundaries.



However, as the face of our customers become increasingly international, this awareness needs to cut an even wider swath. HDI recognizes the need to offer top-shelf Training, Membership, and Event services locally, regardless of time zone, via cultures and languages more familiar to our members.

Our newest office, HDI MENA, located in Dubai, serves the Middle East and North Africa under the direction of Moustafa Kadous, CEO and President. Offices in Europe and Asia Pacific are slated to open in 2006 to complement existing offices in Brazil, Japan, Australia, the Middle East, and North Africa.

Announcing HDI's New Interactive Library

Continuing its trend of offering innovative ways for its members to connect, HDI is pleased to introduce its new online Interactive Library for use exclusively by members of the HDI community.

The Interactive Library combines a file upload/download interface with Wiki technology, enabling members to share documents or create unique articles that can be updated and changed easily—simply a better, more convenient way to connect and share best practices, templates, case studies, tools, and techniques with IT service and support industry experts.

HDI Customer Satisfaction Index (CSI) Demo Available

HDI's Customer Satisfaction Index survey tool (HDI-CSI) truly meets the needs of our industry—an industry that depends on customer satisfaction for survival—while setting the industry standard for secure customer metrics.

After initial set-up (typically 30 minutes or less), the tool automatically surveys customers based on selection criteria set by you. Weekly and monthly results are delivered right to your desktop in an easy-to-read graphical format—comparing your organization to pre-determined goals assigned by you, to others in the support industry, and to others in your specific industry.

Please call 719-268-0308 (or call 1-800-248-5667 toll free and ask for Jordan Connett) to view a free online demonstration from the comfort and convenience of your office.