Leading IT Service & Support

May/June 2006

HDI Support World[SM]

Part One- Uncle Sam's Computers:

What We Can Learn from the U.S. Federal Government's Approach to IT Management

Strategy

Achieving IT Quality and Audit Compliance with a Process Framework

Service Mgmt.

UFFA

Knowledge Mgmt.

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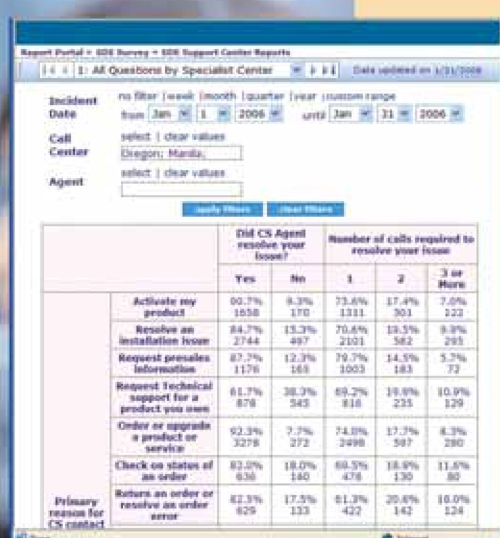

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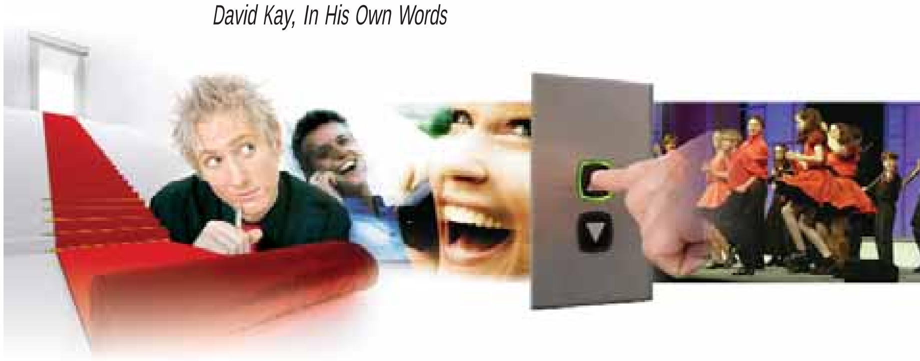


letter from the EDITOR

SupportWorld Readers,

It was such a pleasure to meet so many of you in Nashville in March. The enthusiasm you showed for our industry was phenomenal. Service and support management may be frustrating, but more often it's a challenge. It's the challenge and the desire to learn more that raises our annual conference to a new level every year. You can relive the key moments in Nashville by reading the trip report on page 10. It is truly a time to remember.

In this issue, we consider the U.S. federal government's approach to IT. Our feature article, "Uncle Sam's Computers" gives insight into how the U.S. government develops and manages its IT infrastructure.

You'll also find an article presenting a five-step approach to assessing your IT operations based on ITIL best practices. ITIL is important to providing quality service and support and can deliver far-reaching benefits. This article explains how to review and document ITIL processes in your organization in order to create an action plan for enhancing the IT service and support management function.

You readership and continued interest in the magazine is appreciated. Please feel free to make comments and suggestions or to submit articles and ideas you would like to hear more about to jneider@ThinkHDI.com.

Best Regards,

Julie Neider

Julie Neider

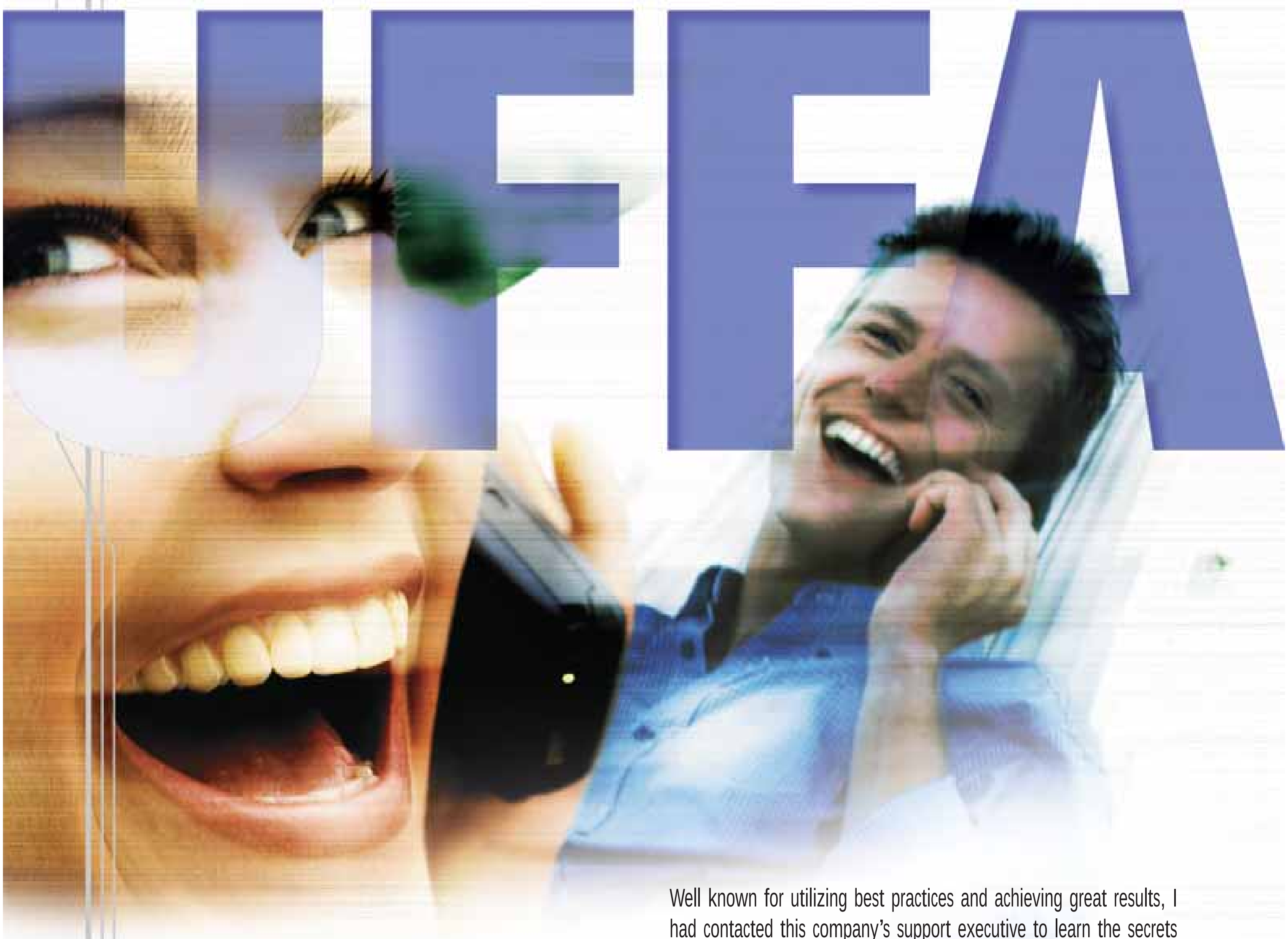
Please send your comments and questions regarding SupportWorld.
Letters to the editor should be sent to **jneider@ThinkHDI.com** or by mail to: **102 South Tejon Street, Suite 1200 • Colorado Springs, Colorado 80903**

We reserve the right to edit all letters.

As I stepped off the elevator and entered the core of the organization, I heard a group of people yell out "**UFFA!**" I froze in my tracks, as I was not sure what I had just heard. It was early morning and before any call to action. Every station was empty and there was no sign of life in the command center. Then I heard it again, "**UFFA!**" This time I was able to pinpoint the source and I slowly moved closer to investigate. As I approached the war room, as it was so properly labeled, I heard it again, "**UFFA!**"

by Richard Joslin

UFFA



Well known for utilizing best practices and achieving great results, I had contacted this company's support executive to learn the secrets to their success. She was kind enough to set up a meeting for me with their support center manager. I had arrived early in eager anticipation for my morning meeting. Now I was starting to question my decision. And then there was another yell of "**UFFA!**" and the door to the war room opened.

Support analysts, full of energy, exited the room and went straight to their workstations. As they made eye contact with me, they said, "Good morning sir," and smiled as they walked by.

Then a man carrying a handful of papers walked up and extended a welcoming handshake. "You must be Mr. Joslin. My name is George Brunner and I am the manager of this operation. LeeAnna mentioned that you would be stopping by to check out our support center. Please follow me to my office." LeeAnna was the support executive that had arranged my visit. As we walked to his office, we passed by two bulletin boards. One contained a number of charts and the other was labeled "UFFA." The UFFA board was full of awards, recognition letters, and reports.

"So, how can I help you?" asked George as we entered his office.

I paused, as my curiosity about UFFA had caused me to loose my focus. Then I asked, "My original goal for this meeting was to learn why you are so successful. But before we begin, I have to ask about UFFA. What is it and why was everyone shouting it this morning?"

"Actually, UFFA is why we are successful. UFFA has become the way we solve problems for our customers. As a result, we have increased our quality of service and our customer satisfaction is at 96 percent. Our cost per incident has dropped by 28 percent, our time to resolve problems has improved by 41 percent, and our team spirit is at an all time high. Next month we are going to be launching our self-service portal to give our customers direct access to "Diamond." Diamond is the name of our knowledge base. We expect to be able to eliminate 20 percent of calls related to known problems so the support team can focus more time on the new problems we receive. I also plan to spend some of the additional capacity on a few improvement projects that we have been eagerly waiting to start."

This was clearly a manager that was proud of his support center, and someone I wanted to learn from. I told George that I was impressed and again I inquired, "What exactly is UFFA?"

"I am sorry I did not answer your question," George smiled. "I like sharing our success story. A couple of my team members are former marines and they started the team shouting UFFA during our morning staff meetings. The Marines sum up their spirit with a single word, "Ooh-rah." It unites them. The Army actually has a similar word, "Hoo-ah," and the Navy uses the word "Hoo-yah." Our support team shouts "UFFA" whenever we want to show our support to the team and our commitment to excellence."

"But why UFFA? You said it was the way you solved problems. And now you say it unites your team." I was still confused and very interested in understanding why he tied this one word to their success.

"Before I explain UFFA, I need to give you a little background. Two years ago we launched an improvement initiative to implement knowledge management within the support center. Our IT organization made a commitment to ITIL and the use of best practices. Unfortunately, ITIL did not provide us with the guidance necessary to implement knowledge management. Then I learned about Knowledge-Centered Support or KCS℠. KCS is a set of knowledge management best practices and it compliments our ITIL implementation. We were introduced to UFFA during our KCS implementation. The KCS processes integrate knowledge management with incident management. We don't have knowledge engineers here. Instead, we let every analyst own our knowledge. Every support analyst has the responsibility of capturing new knowledge when it is created, structuring it using our knowledge templates, and reusing it whenever possible.

Since knowledge is the only product of the support center, we named our knowledge base 'Diamond.' It was important for the support team to realize the value they add to the company and that the product they create and maintain every day is knowledge. Naming it allows them to acknowledge it as a product for which they share ownership. I am constantly asking, 'How have you polished the Diamond today?' The answer is UFFA. UFFA summarizes the responsibility of every support analyst when it comes to solving problems and helping to maintain our knowledge base. It stands for:

Use It, Fix It or Flag It, Add It

Use It implies that the support analyst will search the knowledge base to see if the problem is known to the organization before he or she seeks to solve the problem. If it is known, then a consistent answer is given to the customer. Solving problems using the knowledge base is faster then recreating a resolution and it allows the organization to gain knowledge about the knowledge, such as the reuse rate. This is very valuable information for problem management. Because we have integrated our incident management system with our knowledge management system, it is easy to use and a faster means of closing incidents. Our analysts can link the knowledge to the incident and the incident is fully documented automatically.

Sometimes an analyst will find a solution that is not 100 percent correct or up-to-date. No one says, 'There is garbage in the knowledge base,' as that would mean they left it there. When a defect is found in our product, each analyst has the responsibility to *Fix It or Flag It*. As analysts demonstrate their ability to add quality knowledge without impacting the health of the knowledge base, they earn the right to fully own our 'Diamond.' They are given the capability to change or fix knowledge real-time. This helps keep the knowledge current and our customers get the best knowledge possible. If the analyst has not earned the right to *Fix It* yet, then he or she has the responsibility to *Flag It*. *Flag It* allows comments to be added to the knowledge so that an analyst with *Fix It* rights can make the correction.

And the final part of UFFA is *Add It*. If the problem is not known to the organization, then it will not be in the knowledge base. These are new problems that the analysts need to resolve. This may require research or working with our support partners. Once the resolution is discovered, the analyst will *Add It* as new knowledge in the knowledge base. Then, if the problem occurs again, any analyst will be able to Use It, eliminating the rework."

As our discussion continued, I learned more about UFFA and how it changed the culture within their support center. It became apparent to me that I needed to learn more about Knowledge-Centered Support and how I could implement it within my company.

To learn more about Knowledge-Centered Support, attend the *Knowledge Management Foundations: KCS Principles* course offered by HDI.

This is the first of a series of articles on Knowledge Management Best Practices by Rick Joslin. If you want to learn more about knowledge management or would like to pose a question or idea for future articles, send a message to Knowledge@ThinkHDI.com.

Rick Joslin is a recognized expert, speaker, and author in knowledge management and a certified KCS instructor. Rick is a Principal Consultant with IHS Support Solutions, an HDI Certified Instructor, and a member of the Consortium for Service Innovations' KCS Program Committee and the Strategic Advisory Board of HDI. For more information, visit www.ihssupport.com.

HDI®
2006 Annual Conference & Expo
World Conference on Customer & Technical Support

HDI 2006 TRIP REPORT FROM NASHVILLE

Another year at HDI 2006 Conference and Expo—the support industry event—has come and gone already. I can still vividly picture 2,500 eager faces, people waiting with anticipation as the lights went down and the band cranked it up. The roar of laughter throughout the Presidential Ballroom as Marni Vos mimicked her mother's laugh—"snort"—still echoes in my ears. And, the bumps and bruises still loom across many a rider's backside following 7 seconds of bull riding prowess at the Wild Horse Saloon. Take a quick step back into Nashville time as we relive the biggest moments of our week.

Sunday. March 19. 4:25 P.M. Take your positions. Headsets on. House lights down. Cue opening video. Three – two – one. "Howdeeeeee!," shrieks Minnie Pearl. We're definitely in Nashville now. It was another spectacular HDI event. An all-star line-up of keynote speakers. Live bands. Minnie Pearl and "Reba McIntire." Three days of pre-conference workshops, certification tests, and local chapter meetings were already under our belts. And that was just the beginning.

Reba McIntire created a frenzy of her own. Our look-alike performer was such a dead ringer for the real Reba that heated debate reverberated throughout the corridors all week long. Opinions were split—I think some people still believe it was the real Reba. Yes, she was that good!

Following welcome remarks from our hosts, Ron Muns and Cinda Daly, wheelchair athlete Chad Hymas captured our hearts in the opening keynote speech. Drawing upon many personal experiences, Chad weaved stories about vision, individual achievement, and personal connection. Chad's touching photo montage of his small boys, who actively shared in his rehabilitation from quadriplegic to wheelchair athlete, left few dry eyes in the house. His strength and vision inspired us all and carried us throughout the week.

5:30 P.M. Welcome to the Technology Connections Expo. A jazz quartet, a rich array of food and beverages, and more than 80 exhibitors welcomed our conference guests to the opening reception in the largest and busiest expo to date. Exhibitors unveiled new products on the HDI Launch Pad Stage, entertained interested buyers with in-depth demos, and stamped poker hands for the expo prize giveaway promotion.

The HDI Membership Booth, all decked out like the Grand Ol' Opry stage with oak barrels, bales of hay, and a towering red barn, was the hub of membership buzz and activity. The HDI Local Chapter officers, who manned the booth, were quite popular as the patrons of the cool HDI t-shirt giveaway. Rich Hand, HDI's executive director of membership, unveiled the new HDI Customer Satisfaction Index tool (CSI), and the HDI team offered non-stop demos as members and attendees networked and shared thoughts about the new tool.

HDI global partners from Belgium, Brazil, and the new Middle East/North Africa organization showed the growing presence of HDI worldwide as they gathered at the HDI booth, building relationships and sharing experiences about the global support industry. The vertical market forum members also gathered at the booth to share valuable information with others in their industry. Exhibitors enjoyed a wine and cheese reception at the booth where they discussed new product offerings and shared the buzz around the expo floor. Finally, on the closing expo day, the HDI booth was the focal point for the expo prize giveaway, where expo goers reaped the spoils of more than 50 great prizes.

Monday, March 20. One of our rules of engagement for the week was, "Don't forget to get up in the morning." Kirk Weisler started our day with Daybreak Stories, an HDI tradition, sharing excerpts from his favorite books, quips from famous personalities, and personal anecdotes to enlighten the day. Fueled with food and inspiration, everyone was ready for the first full day of the conference.

Monday's activities set the tone for the rest of the week. The breakout sessions were packed, with many popular speakers playing to standing room only crowds. The Technology Connections expo hall was brimming with enthusiastic visitors all day long. And, the general sessions, one to start each day and another to wrap up the day, created a stir that resonated long after the cameras went dark.

8:00 A.M.The teen fiddlers, Fiddler Frenzy, charmed us with a medley of songs, while the Little General Cloggers tapped and clogged along to the beat. The fiddlers' rendition of "The Devil Went Down to Georgia" got the morning general session off to a lively start. We're still in Nashville after all!

Then, industry veteran Geoffrey Moore, challenged our intellect with his keynote speech based upon his newest book, *Dealing with Darwin.* Geoffrey examined the twelve vectors of innovation that companies need to identify and capitalize upon in order to maintain competitive advantage, and connected the role that IT and support organizations play in that dynamic.

He then summarized two keys to success. First, focus investment so that it results in market-validated differentiation that leads to revenue and profit improvements. Second, fund investment by unblocking the flow of talent and recycling the existing workforce back onto core competitive advantage.

3:45 P.M. HDI Founder Ron Muns delivered the state of the industry address to a packed auditorium. Always a provocative thought leader, Ron peppered the audience with challenges, predictions, and calls to action. On the subject of outsourcing, Ron challenged companies to offset off-shoring with support optimization. He suggested that we focus on the value proposition and deliver high quality support at a low cost. He also recommended that support teams become actively engaged in the productivity improvement of IT.

Ron acknowledged the strong impact IT support organizations now have on technology purchases. He challenged technology vendors to make a better business case for the supportability and quality of the products they develop, or cautioned that they would be replaced by other solutions. He predicted that by the end of 2007, as open systems continue to become mainstream, a new player in the software market will take over a major share of a software category by embracing open systems and customer support.

Finally, Ron challenged the British government, which is actively seeking a third party vendor to outsource the maintenance, distribution, and certification of ITIL, to give the ITIL framework and support to itSMF, with a simple royalty structure and walk away. Ron concluded, "IASCA controls COBIT. Let itSMF control and manage ITIL."

Photo by Phil Gerbyshak

4:15 P.M. Let's play Jeopardy! And the game did go on, despite the last minute drama when we learned that Ken Jennings was stranded in a blizzard at the Denver airport and would be unable to make his appearance. Little did our audience know that one of our faculty members, Marni Vos, was a hot shot, award-winning comedienne, in the company of Ellen DeGeneres and Paula Poundstone. With the creative spirit and desire to help, Marni dusted off some of her best stand-up comedy routines and had our sides splitting in laughter, all with just 30 minutes to prepare.

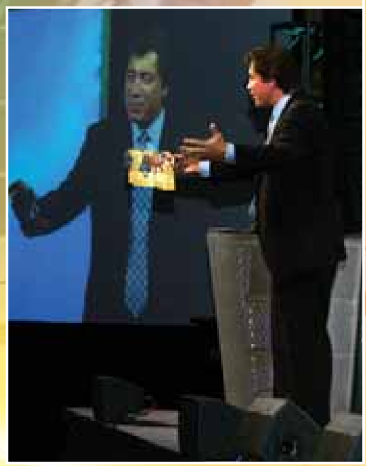
Then, Marni took her place alongside audience contestants Jeffrey Brooks, from Formscape, and Eric Phillips, from the FBI. The deadpan wit of Jeffrey and Eric alongside Marni's quick repartee made for a spirited game. Kirk Weisler, quite dashing as Alex Trebek, held his own with hysterical one-liners and exasperated sighs. The contestants had a little trouble with proper phrasing, but the audience nudged them along: "What is..." resonated from the chambers.

The championship came down to the final category, support centers. The final clue was: "The help desk contacted by dialing 1-800-829-1040." Jeffrey was quite the audacious player—he whipped out his cell phone and dialed the number to get to a final question. Jeff Davis, a popular faculty member and stand up comedian in his own right, quipped, "Jeffrey, this is not 'Who Wants to Be a Millionaire.' You have no life lines." But Jeffrey's call was to no avail—no one answered! And no one got the final jeopardy right. Eric and Marni bet it all and were left with $0. Jeffrey won with $2,300, play money of course. But, he did win a complimentary conference registration to HDI 2007.

Tuesday, March 21. It was a full day Tuesday with the announcement of the Team Excellence Award winners, two outstanding keynote speakers, the exciting and unabandoned chaos of the expo prize giveaway, and the legendary party at the Wild Horse Saloon.

8:00 A.M. Guitar in hand and belting out original lyrics, faculty member Dave Timmons connected folks with an energizing general session wake-up. Dave had the audience on its feet, high-fiving their neighbors and bringing down the house. "I'm a call center manager, I'm Superman and Wonder Woman, too..."

Marcus Buckingham, the morning keynote speaker, challenged each person to focus on individual strengths in order to see true performance growth. During years of research, Marcus has discovered that in the U.S. just 17 percent of the people get to spend most of their day focusing on their strengths. He lamented that even though he has sold more than a million copies of his book, *Now Focus on Your Strengths*, that needle has not moved at all in five years. One way to move that needle is to accept these truths: 1) as you grow you become more of who you really are; 2) you will grow most in your areas of greatest strength, and 3) you will contribute most to the team when you offer up your strengths.



Marcus commanded the stage with quiet sophistication and strong conviction. His ideas captured the audience, who gave him a standing ovation and then stood in line for more than two hours to get a signed copy of his newest book, *The One Thing You Need To Know.*

3:45 P.M. Emmy-award winning comedian Ross Shafer offered the perfect blend of laugh-out-loud humor and motivational content with his "Nobody Moved Your Cheese" performance. From personal quips to hysterical TV clips to lampooning the self-help industry, Ross gave us a fresh perspective for taking charge of our own success. In his own inimitable way, Ross reinforced Marcus Buckingham's sentiments with his belief that success is our own fault, and he gave us plenty of examples. He took on Tony Robbins; "He's so optimistic that if he ever went to jail he'd tell people he lived in a gated community." And, Patrick Lencioni, author of The Five Dysfunctions of a Team. "You think there are only five? What if you have six members on your team," Ross joked.

7:00 P.M. The party. The crowd went wild at the historic Wild Horse Saloon—60,000 square feet of pure fun on three levels. All the HDI traditions were intact, along with a few surprises: tattoo artists, caricaturists, Texas hold 'em poker tables, pool tables, video karaoke, line dancing, and a giant riding bull on the main dance floor. Bull riders were unceremoniously thrown to the mat after a few brief seconds aboard. Rumor has it that one guest managed a ride of 23 seconds—we're waiting for her to come forward!

The dancing heads video-karaoke offered the "fans" plenty to be amused by as they waited for their turn at video fame. Crooners placed their heads behind a green screen while the videographer projected images to create a full visual rendition of each song.

But, the Low Cash Cowboys stole the show as they played rockin' country, blues, and popular cover tunes tirelessly for four straight hours—yes, not a single break. The band rocked. The ladies danced. The men cheered. We shut down the house well after the planned party hours.

HDI Honors Award Winners in HDI 2006 General Sessions.

Sunday Award Highlights.

The HDI Local Chapter Officers honored the Local Chapter Excellence winners at their annual meeting. The Local Chapter winners were *Austin, for Program; Delaware Valley, for Membership; Mid-Ohio, for Newsletter; Dallas, for Web site, and North Coast for both Special Events and Best Local Chapter Overall.* The officers also honored Katherine Spencer Lee, executive director at Robert Half Technology, for her dedicated years of service to the industry and the HDI community.

Monday Award Highlight.

Sheri Robertson was selected as the *HDI Analyst of the Year* and honored at the Monday morning general session. A five-year employee at Alston and Bird, Sheri was sponsored by the Atlanta Local Chapter. This was the third presentation of this annual award, sponsored by HDI and Robert Half Technology.

Tuesday Award Highlights.

The 14th annual Team Excellence Awards were announced Tuesday. The finalists in both award categories created videos of their organizations and teams, highlighting their philosophy and achievements. These videos were premiered in the general session to introduce each team. *American Honda Motor Company received the Team Excellence Internal award.* Marian Proffer accepted the award for the team.

Cablevision received the Team Excellence External award. Jerry Camara accepted the award for the team.

Wednesday, March 22. Yes, we shut down the house on Tuesday night, but we were up bright and early for the final breakout sessions Wednesday morning, capturing the last opportunities to learn something new and head back to the office raring to go.

11:15 A.M. Our closing general session gave us one more chance to get together as a group—now a tightly connected community. We reveled in the experience as host Ron Muns rolled the highlights video showcasing the week's festivities, now another chapter in our history.

Our final keynote speaker, Dave Timmons, set us up to return home filled with ideas, conviction, and a renewed spirit of leadership. He shared his six strings of leadership metaphor, where each guitar string represents a key leadership value: courage, trust, truth, connection, inspiration, and action. Blending personal stories, anecdotes from courageous leaders, and song, Dave reinforced his philosophy that leadership is the highest form of service and serving just one person makes you a leader. As a final farewell, Dave gave away a brand new acoustic guitar, autographed by each of the keynote speakers on the program.

12:30 P.M. So it was time to say farewell—connected, energized, and armed with actionable ideas. It was a trip. See you all next spring at the Mandalay Bay in Las Vegas.

ACHIEVING IT QUALITY AND AUDIT COMPLIANCE WITH A... Process

This article explores a process framework that facilitates continuous improvement and can be utilized by a center of excellence approach. In other words, the process framework can be implemented in one area of IT service management, and once it has improved to an acceptable level of quality, the framework can then be applied to another area.

by Chris Wade *and* David Green

Why do IT service management organizations need a process framework that facilitates continuous improvement?

Simply providing satisfactory performance for IT infrastructure and applications is no longer enough in today's competitive business environment. More than ever, IT departments are expected to deliver quality business services to their customers and respond to audit requirements such as for SOX, HIPPA, and ISO 20000/27000/27001.

To consistently deliver these expectations, IT organizations need to achieve the level of service management process maturity that embeds continuous improvement into the organization's daily activities.

IT Service Management Maturity

IT service management process maturity can fall anywhere from 0 to 5 on the following scale:

- Level 0 Absence – No repeatable processes in place
- Level 1 Initiation – Some individuals repeating processes
- Level 2 Awareness – Some groups of people collaborating with processes
- Level 3 Control – Formalized documented and repeatable processes are established
- Level 4 Integration – There is integration between 2 or more formalized, documented, and repeatable service management processes
- Level 5 Optimization – There is integration between the integrated service management processes and the business processes that the organization delivers and supports

When Level 5 Optimization is reached, the continuous improvement cycle associated with a best practice methodology such as Six Sigma can be executed.

Building a Best Practice Process Framework

Best practice business process entails simplifying, standardizing, and adding a framework to day-to-day activities. The framework should encompass four major areas: the processes, the people who execute the processes, the technology that supports the processes,

Framework

and the relevant information sources. Building a business process framework that will enable your organization to reach Level 5 Optimization requires the following components:

- A Configuration Management Database (CMDB) for managing the information about the services, and IT assets and Configuration Items (CIs) that the services rely on.
- A knowledge base that delivers information to support staff and customers.
- A customer portal where customers can access information, or request support and changes for their services.
- A work flow engine for managing the process of responding to customer requests.
- A customer survey for collecting feedback from customers on how well the request was satisfied.

CMDB

A comprehensive CMDB is invaluable for managing an organization's services, IT assets, and CIs. The CMDB is a central point of reference that monitors and provides information about what IT assets and CIs the organization owns, what services they support, where they are located, how they are configured, and who is responsible for their care and maintenance.

The CMDB also acts as a traffic cop that guides people to the source of information. It is rather like a "one stop shopping" for service, configuration, and asset information.

How the CMDB is maintained is documented in policy and procedure documents that are readily located by searching the knowledge base. The CMDB maintenance is also formalized and made repeatable using the workflow engine.

Knowledge Bank

Another source of information is the knowledge bank which provides up-to-date, relevant solutions to enable self-help for customers and faster resolution by support staff.

"Knowledge Centered Support" (KCS℠) is a best practice knowledge management methodology which encourages rapid knowledge creation and reuse. It helps grow the knowledge bank and enables it to efficiently and effectively support IT service management activities.

An example of this is when an incident is logged through the portal and picked up by a frontline analyst. As a first step the analyst profiles the incident, which automatically initiates a search of the knowledge base for material that may assist in resolution. At this point, three possible scenarios can play out. Firstly, a knowledge article is located which completely resolves the incident. In this situation, the incident record is linked to the article and closed. The preservation of the link from the article to the incident record ensures that later users of the article can investigate other incident records which may be linked to it, to gain context specific descriptions.

The second possible scenario is that an article is found matching the criteria of the logged incident but it is incomplete or the current incident brings new information to bear on the article. In this case, the article is updated with the new information, linked to the incident, and then the incident is closed. In this way Knowledge Centered Support encourages continuous improvement of knowledge base content and keeps it current and relevant.

If an article does not exist for the resolution of the incident, then it is created so that it is available for the next incident of the symptom.

As content is created and continuously improved, it is evaluated for publication. Material that is published to the customer portal is available to the public, and is therefore capable of deflecting a number of routine incidents from being raised by customers (and therefore having to be addressed by service desk personnel). This results in real gains in efficiency, as personnel are able to direct their energies to more complex incidents. This leads us to the next component of our process framework, "The Customer Portal."

Customer Portal

A best practice approach to IT service management begins with building a process that responds to customer needs. For a business process to be adopted and used by customers and support staff, it must be easy to use and add value to their work. Without this, adoption will be slow and in some cases may not even happen. A high quality process requires relevant and useful information to be made available as early as possible. If this is not done up-front, the process may have to be rebuilt and require additional resources.

The key to starting a process with accurate and up-to-date information is to create a portal request form that is easy to use and designed to gather standardized information for an incident or request. The portal request form should integrate with the CMDB to draw on information about services and CIs relevant to individual requests. The information gathered in the form should then be used to complete the request documentation and start the automated workflow routing, which is managed by the next component—the workflow engine.

Workflow Engine

The conduit for bringing the people and the information together in a business process is the process technology, commonly known as the workflow engine. The process technology is considered a conduit because it facilitates the repetition of standard procedures in a predictable manner.

An IT process tool needs to coordinate the activities of multiple roles as it progresses through the planning, scheduling, building, testing, and deployment stages. At every step in the process, information will be required from the CMDB and/or the knowledge bank. The process also needs to maintain the CMDB's accuracy by updating it in a timely manner as configuration changes are made to test and production systems.

In order for a process to be predictable and repeatable, it must be monitored for threats to its performance. This will ensure that appropriate adjustments can be made throughout the process to maintain control and optimize the end result. The metrics for monitoring the process are provided by Service Level Management, which comprises of Service Level Agreements (SLAs), Operational Level Agreements (OLAs), and Underpinning Contracts (UCs). SLAs are the metrics for the service delivery performance, OLAs are the metrics for the performance of the support groups and UCs are the metrics for the performance of outside service providers.

Customer Survey

The customer survey is the vehicle for gathering feedback about how the customer perceives the quality of the service support and delivery experiences. This feedback enables the IT organization to gauge how well its customers think it is delivering the business services. This information is stored in the CMDB as the repository of record, and is input for the continuous improvement step in the workflow engine's process, which decides whether or not an improvement change needs to be made to the process framework.

Conclusion

If IT organizations are going to consistently deliver quality business and IT services, and effectively respond to audits, they need to embed continuous improvement into the organization's daily activities.

This article explored a framework that can start small in one area of an IT organization, and then evolve into a best practice that can be applied to other areas that are in need of effective service management. Once the IT organization has matured its service management to Level 5 Optimization; perhaps it will have earned the role of "Center of Excellence" for service management. It may even be in a position to assist the business as a whole whenever it has service management improvement needs.

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David Green's role at Infra Corporation includes product development for the Knowledge Bank module in infraEnterprise, managing Infra's internal knowledge management processes and consulting with clients for their knowledge management projects. Prior to joining Infra Corporation, David lectured and tutored on computer modeling, artificial intelligence, speech recognition, and optical character recognition at the University of Western Sydney, Australia.

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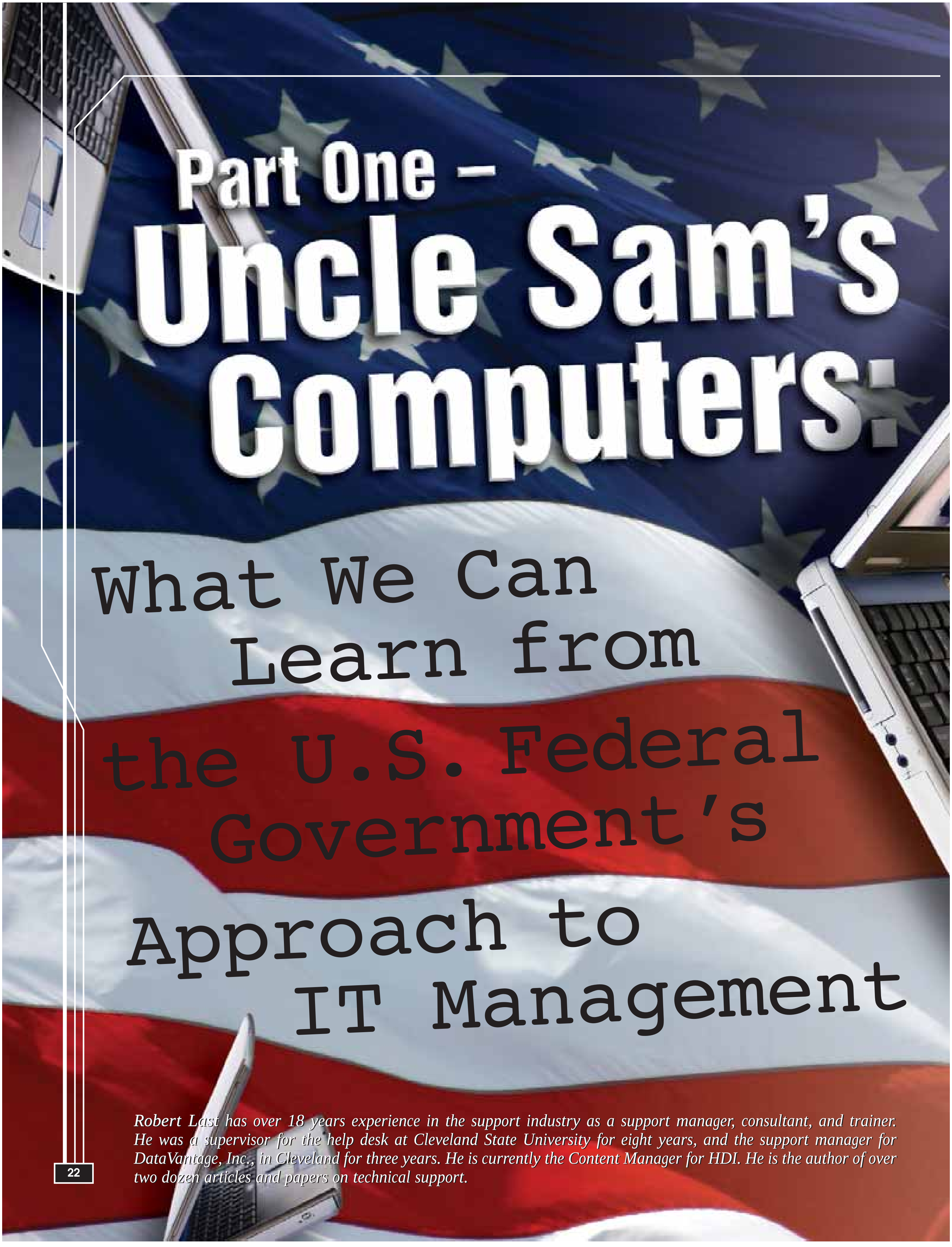
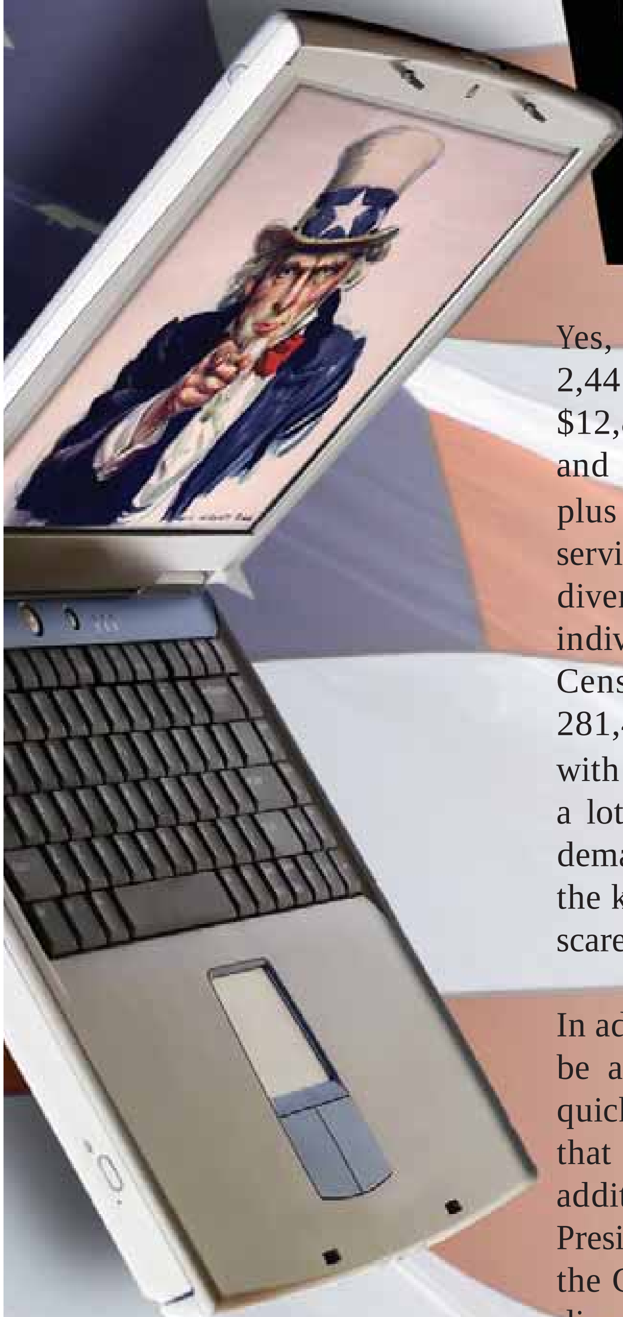


Part One – Uncle Sam's Computers:

What We Can Learn from the U.S. Federal Government's Approach to IT Management

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.

by **Robert S. Last**



When it comes to how the Federal government develops and manages its IT infrastructure, the news is surprisingly encouraging and upon close examination, even good. Uncle Sam can teach us something about IT management.

Yes, this is the same government that employs 2,445,287 full-time people with an annual payroll of $12,844,765,857; has 15 cabinet-level departments; and hundreds of other agencies, boards, commissions, plus the Congress and the Judiciary[1], all delivering services, paper, data, and information to thousands of diverse groups, state and local governments, and individuals every day. We are a country that the 2000 Census reports has a resident population of 281,424,602 people, living on 3,794,083 square miles with 256,645 square miles of inland waterways.[2] That's a lot of PCs, servers, and security in a structure that demands a lot, is under intense public scrutiny, and has the kind of oversight and budgetary process that would scare a Harvard Business School graduate.

In addition, the federal government was not designed to be a fast-moving organization that adapts to change quickly. It has to routinely satisfy competing interests that define the "public good" in very different ways. In addition to these characteristics, it answers to the President (via the Office of Management and Budget), the Congress, and the Judiciary, and always the public; diverse groups that seldom agree on anything.

[1] "Federal Government Civilian Employment by Function: December 2004," http://ftp2.census.gov/govs/apes/04fedfun.txt Printed: April 4, 2006.

[2] "Table 1-Population and Area; 1790 to 2000," Statistical Abstract of the United States: 2006, U.S. Census Bureau, 8.

Why can't the government run like a business?

This is a common refrain that has been uttered in some form since the founding of the republic; the short answer is that "government" has one set of priorities and business has another. Government in the United States has evolved to provide certain services that the for-profit sector cannot and does not want to provide. Government supplies a "public good" (a term that has its own set of definitions) that is often intangible and subject to the budgetary contortions that often define the relationship between the Congress and the President. Business, on the other hand, supplies goods and services in exchange for a fee and is governed, to a large degree, by a competitive market.

This is not exactly the ideal environment for developing, implementing, and managing complex programs and their associated IT services. As Nicholas Carr reminded us a few years ago, there is a contentious debate about the use of IT in the private sector that is still underway.[3] Try explaining Carr's argument to the Office of Management and Budget and the Senate Finance Committee during a budget review or an oversight hearing. And let's not forget that the private sector has had its own share of difficulties with information technology and its practitioners.

Historically speaking, the field of information technology only came into being when the IBM 360 was first produced, in 1964. "This generation gap means," as one team of observers has put it, "…that, in most organizations, the corporate parent—caught in the linguistic chasm between tech-speak and business-speak—has no idea what its youngest child is up to."[4] Consequently, since the preparations for Y2K, IT departments have been under extraordinary scrutiny by their CFOs, CEOs, and boards to such an extent that the term "ROI,"—Return on Investment—has entered the daily lexicon of the CIO and the IT department. The corporate parent is watching, listening, and questioning everything the IT folks are doing, but still not always understanding the impact, implications, or ingenuity of IT. Both parties are still struggling with each other to understand that, "Making IT work has little to do with technology itself."[5]

How the Feds Do IT

In this year alone, the U.S. federal government will spend over $65 billion on IT projects; at least 252 projects are budgeted for $50 million or more (the money allocated to the agencies constituting the Intelligence Community are not included in this figure). When Uncle Sam spends our money, he does it in a big way; and you can bet that if any of the projects fail, it will be big news somewhere.

For example, the most recent examples of failed federal IT projects include:

- During FEMA's operations in the Gulf region in 2004, FEMA personnel experienced the failure of their e-mail system 5-10 times a day, could not save or download documents, and experienced a main server failure that stopped the work of 2,000 IT staff for as long as 20-30 minutes at a time;[6]
- The U.S. Navy has wasted $1 billion since 1998 on four flawed ERP pilot projects based on SAP AG software;[7]
- The most famous recent case was the failure of the Federal Bureau of Investigation's (FBI) four year, $170 million Virtual Case File project that was completely scraped in March 2005.[8]

Clearly, not an impressive record of success, but all is not lost because the federal government is looking for new ways to manage IT projects. Beginning in 2002, the Bush Administration launched The President's Management Agenda. Under this plan, the Office of Management and Budget (OMB) has created Executive Branch Management Scorecards that will track how well each department or major agency is executing the following government-wide initiatives: Strategic Management of Human Capital, Competitive Sourcing, Improving Financial Performance, Expanded Electronic-Government, and Budget and Performance Integration. The scorecards themselves employ a simple grading system "common today in well-run businesses:

[3] "IT Doesn't Matter," Nicholas G. Carr, *Harvard Business Review,* May 2003.

[4] "Getting IT Right," Charlie S. Feld and Donna B. Stoddard, *Harvard Business Review,* February 2004, 1.

[5] *Ibid, p. 2.*

[6] "Update: FEMA's IT systems hampered Hurricane Response in '04, GAO says," Linda Rosencrance, *ComputerWorld,* October 03, 2005. URL: http://www.computerworld.com/printthis/2005/0,4814,1050905,00.html.

[7] "GAO: Navy sinks $1 B into Failed ERP Pilot Projects," Marc L. Songini, *ComputerWorld,* November 10, 2005, URL: http://www.computerworld.com/2005/0,4814,106121,00.html.

[8] "FBI 2.0," Frank Hayes, *ComputerWorld,* March 20, 2006, URL: http://www.computerworld.com/printthis/2006/0,4814,109676,00.html.

- **Green** for success: implementation is proceeding according to plans agreed upon with the agencies;

- **Yellow** for mixed results: some slippage or other issues requiring adjustment by the agency in order to achieve the initiative objectives on a timely basis; and

- **Red** for unsatisfactory: initiative in serious jeopardy. Unlikely to realize objectives absent significant management intervention.[9]

Federal Information Management Reforms Initiated by Congressional Mandate

While the White House has initiated one set of management tools to improve IT investment and management, the Congress in the course of exercising its budget review and oversight responsibilities, has crafted an entire series of legislative mandates relating to IT that go back to 1966. The executive departments are required to follow these mandates. The requirements of these mandates have been codified into a specific set of best practices that has been divided into two parts: IT Strategic Planning/Performance Measurement Practices and IT Investment Management Practices. These best practices are listed below.

IT Strategic Planning/
Performance Measurement Practices

Practice 1.1: The agency has documented its IT strategic management process, including, at a minimum:

- The responsibilities and accountability for IT resources across the agency, including the relationship between the CIO, CFO, and mission/program officials; and

- The method by which the agency defines program information needs and develops strategies, systems, and capabilities to meet those needs.

Practice 1.2: The agency has documented its process to integrate IT management operations and decisions with organizational planning, budget, financial management, human resources management, and program decisions.

Practice 1.3: The agency requires that information security management processes be integrated with strategic and operational planning processes.

[9] "The President's Management Agenda," URL: http://www.whitehouse.gov/results/agenda/scorecard.html.

Practice 1.4: The agency has a process that involves the CFO, or a comparable official, to develop and maintain a full and accurate accounting of IT-related expenditures, expenses, and results.

Practice 1.5: The agency prepares an enterprise-wide strategic information resources management (IRM) plan that, at a minimum:

- Describes how IT activities will be to help accomplish agency missions and operations, including related resources; and
- Identifies a major IT acquisition program(s) or any phase or increment of that program that has significantly deviated from the cost, performance, or schedule goals established for the program.

Practice 1.6: The agency's performance plan required under the Government Performance and Results Act (GPRA) includes:

- A description of how IT supports strategic and program goals; and
- The resources and time periods required to implement the information security program plan required by the Federal Information Security Management Act (FISMA).[10]

Practice 1.7: The agency has a documented process to:

- Develop IT goals in support of agency needs (The government version of business alignment);
- Measure progress against these goals; and
- Assign roles and responsibilities for achieving these goals.

Practice 1.8: The agency has established goals that, at a minimum, address how IT contributes to:

- Develop IT goals in support of agency needs;
- Measure progress against these goals; and
- Assign roles and responsibilities for achieving these goals.

Practice 1.9: The agency has established IT performance measures and monitors actual-versus-expected performance that at least addresses:

- How IT contributes to program productivity;
- How IT contributes to the efficiency of agency operations;
- How IT contributes to the effectiveness of agency operations;
- Service delivery to the public;
- How electronic government initiatives enable progress toward agency goals and statutory mandates; and
- Agency compliance with federal software piracy policy.

Practice 1.10: The agency has developed IT performance measures that *align* with and support the goals in the GPRA performance plan.

Practice 1.11: The agency developed an annual report, included as part of its budget submission, which describes progress in achieving goals for improving the efficiency and effectiveness of agency operations, and as appropriate, the delivery of services to the public through the effective use of IT.

Practice 1.12: The agency requires that its IT management processes be benchmarked against appropriate processes and/or organizations from the public and private sectors in terms of cost, speed, productivity, and quality of outputs and outcomes where processes and organizations in the public or private sectors exist.[11]

Nothing's Perfect, But…

These best practices are a very good way to align IT operations with the mission of the agency. They are also applicable to the private sector where the complexities of alignment and scorecards have been discussed for several years. The success or failure of these best practices is, like most successes and failures, a result of multiple factors that are found in all organizations. It wouldn't hurt those of us in the private sector to look towards Uncle Sam from time-to-time for guidance, even if only out of curiosity, about how a huge organization is managing our IT investments.

[10] Passed in 2002, the Federal Information Security Management Act is the civilian agencies' primary way of dealing with cyber security, although it applies to national security agencies, too. It mandates compliance score cards and certification and accreditation of federal agencies regarding the quality of their cyber security programs. Does it work? It depends on what you read; some critics argue that the $5.1 billion the federal government spends on cyber security is wasted in paperwork exercises performed by consultants that are ignoring the best practices listed above. See "FISMA Fizzles," David Perera, *GovEXEC.com*, March 15, 2006, p. 1. URL: http://www.govexec.com/story_page.cfm?articleid=33605&printerfriendlyVers=1.

[11] The preceding best practices are presented in "Information Technology Management: Government-wide Strategic Planning, Performing, performance, and Investment Management Can Be Further Improved," *United States General Accounting Office, January 2004, Report: GAO-04-49, p. 23-27.*

author*interview*

COLLECTIVE *Wisdom*

Author David Kay, In His Own Words

Your new book *Collective Wisdom: Transforming Support with Knowledge*, written by you and Françoise Tourniaire has just been published. Both of you are very active in the knowledge management and support industry fields. What were you trying to achieve with this new book?

I've read lots of books on knowledge management, and it's just like eating cotton candy—they're pleasant, but there isn't any substance. It's nice to talk about a knowledge-creating culture, and the theory of tacit knowledge conversion, and we do discuss these things. But we're assuming our readers understand generally why knowledge management is a good thing—what they need to know is what they need to do when they sit down at their desks.

So we wanted to create a very practical guide that would help real industry practitioners with the problems we get asked about all the time: How should we create knowledge? How should we maintain it? How do we deliver it to people in the support center and through self-service? How do we staff and implement a knowledge initiative? How do we use technology and metrics?

We'd love to work with everyone in the industry in person. But, since that's not possible, we wanted this book to be the best possible stand-ins for David and Françoise.

When did your passion for writing a book on knowledge management for the support industry begin?

Our service desk and technical support customers have been asking us to recommend knowledge management books for years. And for years, we've been sheepishly admitting we didn't know of a book written with them in mind. FT and I compared notes, and we concluded there just was no such book. So we decided we'd write it!

We're both passionate about the topic—how could you not get energized about empowering support analysts and end-users with knowledge? Humans have told stories and learned from each other as long as we've been human, and effective knowledge management is just the next step in the process. Language, writing, schools, craft guilds, printing, the Internet, KM—it's all about giving people the knowledge they need to do their jobs and fulfill their dreams.

You note in Chapter 8, that there are four phases to knowledge management implementation projects. During phase 1, defining requirements, explain the theory "think small, dream big."

That's right, and we think it's good advice for any initiative, but especially for something as transformational—but potentially complex—as knowledge management.

The idea is that we need to have a vision for where we're going and why. In the service desk, that can include making each support analyst more effective than any support analyst is today by helping them take advantage of the collective experience of the organization. It might include engineering usability issues out of the environment, proactively delivering knowledge to avoid problems, and empowering all customers with knowledge so they can solve problems that remain. It's the vision, clearly articulated by an executive champion and reinforced at all levels of the organization that will break through the barriers and inertia to make effective knowledge management a possibility.

But we advise organizations to take on this vision a bit at a time, demonstrating value with each step, and learning from each step. This is the "think small" piece of our motto. By building success on top of success, we get to the ultimate objective faster, even though we don't try to get there all at once. Instead of trying to convince that other group to participate, be successful on your own—and wait for them to come to you insisting that they be included in the next phase!

In your chapter titled, "Knowledge Creation and Publishing" you note that some support centers use only moderately-sophisticated tools but have reasonably large numbers of solutions. Can you explain the effect this has on knowledge capture and delivery?

Sure! We all tend to think of knowledge management initiatives as tool initiatives; since you've read the book you know we feel quite strongly that knowledge management is about people and process first, and it's just technology's role to enable the people and support the processes.

That being said, technology does play an important role in making knowledge work. Nothing takes the air out of the tires faster than authoring tools that make you do backflips with manual tagging or search engines that return nonsensical results to queries. People simply won't use tools that don't respect their time or that get in the way of doing their jobs.

Fortunately, I see technology vendors moving in the right direction, and some of them have added some real intelligence in the way they store and deliver knowledge, as well as the way they integrate with incident management systems. In the particular situation you ask about, we find that there's a critical threshold of solutions—something like 3000, maybe a few more or less—that requires these kinds of smarter tools. Without techniques for automatically classifying content, helping users flexibly navigate search results, and understanding something about the business of technical support, the really simple tools will collapse under the complexity of large knowledge bases.

Invitation to Success:

by Joanne L. Smikle

Success comes by invitation only. It arrives at the door of companies who have devised systems in which they can flourish. Companies can send more invitations for enduring success when they learn how to party hearty.

Beginning with the invitation to success…inviting employees to succeed requires four tricks of the event planning trade. Inviting success is actually very much like preparing for a party or celebration. Using the party planning metaphor, let's explore how to create a triumphant fete.

Trick #1: Party preparation begins with a theme. What is your corporate theme? It is dictated by your mission and values. Are you a company that is driven by the desire to provide exemplary service to customers? Are you revenue-driven? Or, are you a company that is without a guiding mission…just floating along?

That theme, or mission, determines who should be invited to your party. Mission should define every recruitment effort. It is important to hire people who will be fun at the party. That doesn't mean that you have to hire a homogeneous pool of drones. Rather, you need to seek a diverse pool of potential new hires who can live your mission. There may be a few party crashers. These are the people you let slide in. They may be suitable for the party. Or, they may not. Pay attention to every hire so that you can see how they are behaving at your invitation only event. As party host, you have the right to escort nonconformists to the door.

Be careful that, those invited to leave are only the nonconformists who don't conform to the standards put forth in the mission. Divergent thinkers should be welcome at the event. They bring fresh ideas. Think of them as the folks who first introduced "The Electric Slide" at a party where everyone was stuck to their chairs. It's a collaborative dance that anyone and everyone can do. No partners are required, just a desire to shake your rump. And once these nonconformists got people out of their chairs, the energy in the room changed. That is why we want eclectic mission supporters in the company. They bring approaches we wouldn't get if they had not been invited to the party.

Trick #2: Once you have finished working on your invitation list, a list consistent with the party's theme, it is time to move to the menu. This is my favorite part! What are you going to serve your honored guests? Are they a chips and dip crowd or are they more high brow, expecting gourmet hors d'oeuvres? You must plan your menu accordingly (or everyone will go home hungry.)

Think of the menu as what you serve managers and staff every day. Do you provide them with learning opportunities that will fill their hungry minds? Are there sufficient developmental paths to satisfy their needs for growth? Do your party guests have access to learning libraries? These resources allow them to stimulate and satiate their individual intellectual curiosity.

If you let guests go hungry they will find another party. Do you wonder why you sometimes see the best and

Tricks for Transformation

brightest defecting to your competitors? They may not be getting their appetite satisfied at your party. Your menu may be lacking. Require managers and human resource people to collaborate on improving the menu. Encourage staff to take advantage of learning opportunities in your professional associations. Bring in talented teachers from colleges and universities that are willing to create customized learning for your people.

OK, now their tummies are full. Guests can be more productive. Mental hunger is satisfied. You can now decide on the entertainment; that's **Trick #3**. Every successful party has entertainment. Are you having jugglers, a dj, a stripper? Your entertainment must also reflect your theme. If you tout your ethics and integrity, a stripper will be an inconsistent form of entertainment.

Workplace entertainment is the fun. Yep, good old fashioned fun! It can be leader-led fun or staff-promoted fun; it just has to be FUN. Fun allows people to decompress. It allows them to connect on a level deeper than work, tasks, and deadlines. Fun helps staff and managers see each other as more than their positions. They get to see each other as creative, interesting people; as moms and dads, artists, and activists. It is through these revelations that people are able to work more collaboratively. They are more inclined to cooperate and support colleagues that they have gotten to know. This is especially important in companies that espouse a commitment to team work. Teamwork cannot happen when the entertainment does not encourage connectedness.

So, what kinds of things can you do to create fun? It depends on your guests. Consider their interests very carefully. Is this a crew that will enjoy forming a bowling league? Would they like annual picnics in the park? Or, would they be more inclined towards informal happy hours? And don't think that because you are the manager you have to create all of the fun. Encourage other people to take ownership for fun-finding.

Many of my clients have informal fun committees drawn from different departments. A long-term care facility in Florida used an all staff luncheon to promote respect for diversity. The staff planned a potluck where people brought dishes from their countries. In addition to bridging cultural differences, it was exciting to try new foods and different cuisines. Another client has informal ice cream socials in a huge conference room. They offer make-it-yourself sundaes, have a hired scooper on hand to make colossal cones, and have fifties music playing.

It's quite a fun event; the room is decorated like an old fashioned ice cream parlor. Employees from all departments come down and socialize over sweets. Out of consideration for people with special dietary needs, they also offer sugar-free ice cream, frozen fat-free yogurt, and sorbet. Smart thinking! Now every party guest feels welcome.

The invitations have been sent, the theme has been created, and the entertainment has been arranged…it's time for **Trick #4**. This is another of my favorite aspects of event planning. It's when you get to have the party. Yes, this is when all of that preparation gets implemented. This is the night of 1,000 stars. Every one of those stars is a part of your company. These are the very special guests that you have hand selected to both share in and contribute to the affair. And what an affair it will be! The party will never end!

Keeping the party alive, energetic, and festive is everyone's job. This happens with endless meeting and greeting. It happens when everyone works the room, meets the other stars, and facilitates introductions between new stars and established ones. As a manager you have a special role in this part of the event. Lead the charge by socializing with everyone you can find. Meet new people. Talk to everyone from the CEO to copy clerks to directors to janitors to frontline service people. Talk. Listen. Learn.

This is the best part of the party! Circulating throughout the organization is what you should be doing everyday. Keeping the party alive requires you to get out of your office. It requires you to go talk to people instead of relying on e-mail. Party perpetuation calls for an endless commitment to connecting on a human level. Once you model this behavior, it becomes much easier for the people who report to you. This butterfly effect keeps the environment alive, inspiring, and ever-inviting.

The Tricks as Transformers

These four tricks of the event planning trade can transform your organization. Think about it…if you hire the right people and make them feel welcome, you create a positive first impression. If you make a few hiring mistakes and can't get these folks to embrace the mission, they can (and should) be escorted to the door. Everyone doesn't get to stay and enjoy the festivities. But, that does not mean that you turn away people who are different. These are the guests who teach new ways of supporting the mission and fulfilling corporate objectives.

Everyone knows that guests come to eat. I hate going to parties where the food is unappealing. It's even worse when the host runs out of food. That food, the learning, education, and developmental opportunities, is what keeps guests wanting to be engaged in the celebration. The hunger for learning has to be satisfied or employees will find a company that will feed them well. Starved employees will get weak and deliver lackluster performance. So, it's vital that you plan a really good menu that offers something for everyone. Pay close attention to what people partake in. This will tell you which developmental opportunities quench your employees hunger for learning.

If the invitation and the food are what gets them, it's the fun that keeps them. Who do you know who doesn't like a good time? Make sure that you plan lots of fun for your party. That fun should vary so that it meets the needs of the assorted people at the party. Work is not supposed to be drudgery. Assume responsibility for sparking fun. It doesn't have to be expensive; it just has to be FUN! And the funny thing about fun—it's contagious. People begin to let their guard down and bring their own ideas for fun.

You also create fun when you allow employees to author their own work. As the manager, you are responsible for providing general direction and parameters. But that does not mean micromanaging every detail. Step back. Chill out. Allow people to exercise their imaginative abilities. It is the incorporation of imagination that makes the work more fun.

Each and every day is the party. That does not mean every day is Mardi Gras. It does mean that the workplace is alive with energy and enthusiasm. Your efforts and never-ending meeting and greeting pays off because you are establishing a pattern for meaningful human connections. This is not to say that the workplace will be conflict-free, rather that the conflict will be healthy and not destructive. It is the party, the daily manifestation of a satisfying corporate environment that makes you the employer of choice. Let's get this party started!

Joanne L. Smikle is an author, consultant, and speaker specializing in customer satisfaction, leadership development, and team building. Visit her online at www.smiklespeaks.com.

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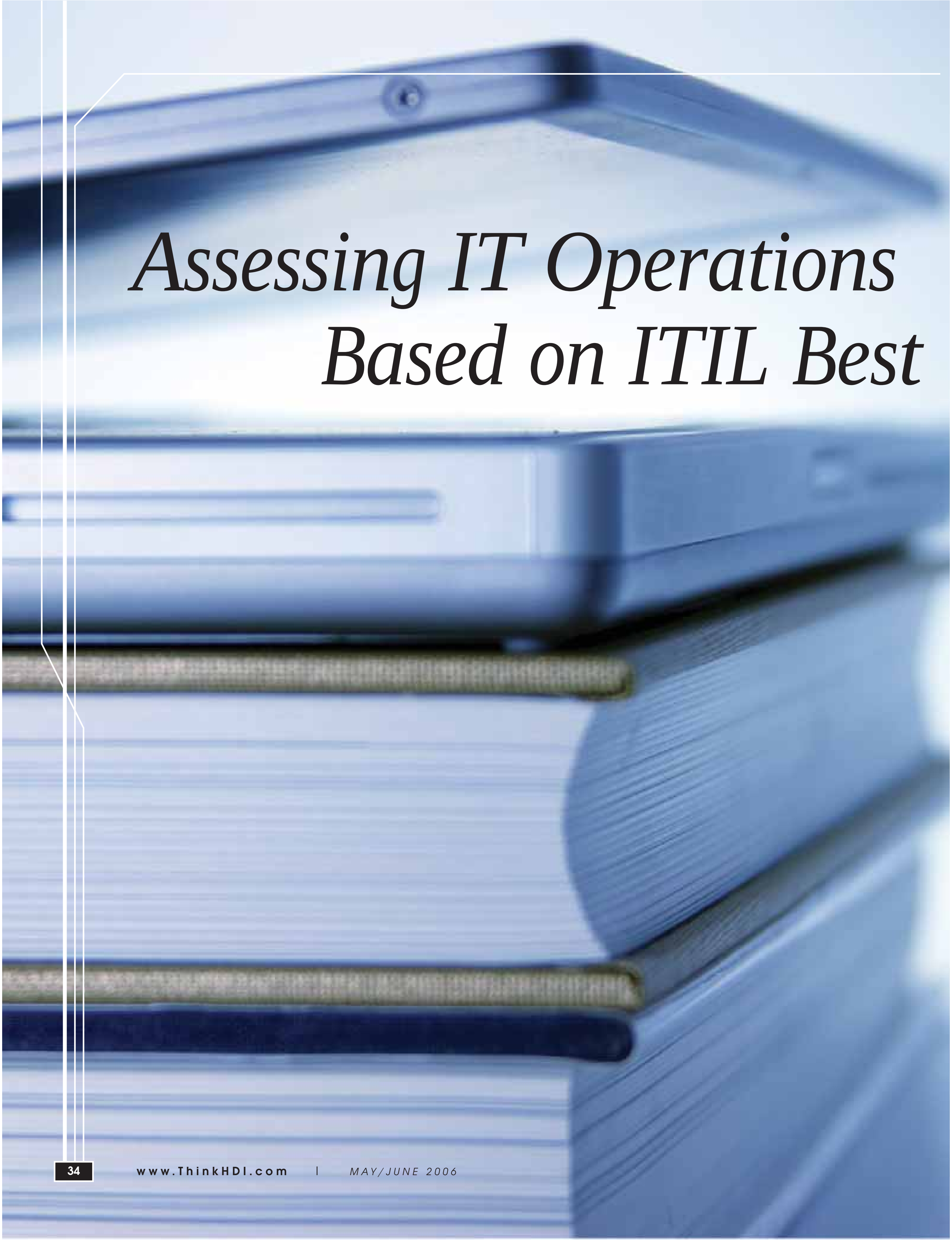


Assessing IT Operations Based on ITIL Best

ITIL, the IT Infrastructure Library, seems to be everywhere these days. A set of books created by the Office of Government Commerce (OGC) in the United Kingdom, ITIL has been adopted by organizations in the private, public, and not-for-profit sectors. The goal of these books is to define a framework for using best practices to manage information technology services.

by Steve Dreyer

Practices: A 5-Step Approach

ITIL is important to providing quality service support and delivery. But it is not a "one-size-fits-all" solution. While it may be the fashion of the day, many organizations find it difficult to implement. The books are quite detailed and the relationships between the various processes can be unclear to some, unless they are related to the specific workflows and requirements of the organization wishing to implement them.

Mature IT organizations probably have some of the ITIL processes implemented (perhaps without actually calling it ITIL). As an example, any company that has undergone a Sarbanes-Oxley review likely has variations of the ITIL Change Management process in place.

But ITIL can deliver far-reaching benefits. So, a question that organizations should be asking is, "What do I need to do to improve IT service management using ITIL as a guide?"

Five-Step Approach

A review of your IT service management function according to ITIL principles and best practices will help to create a baseline from which you can enhance service support and delivery. This review, described here, must be structured to include the right individuals who are stakeholders in the processes being reviewed. It must also provide, in detail, specific recommendations for improvement.

The key participants in the project might include:

- Project sponsor, with overall project responsibility
- Review team, conducting the five steps
- Management to be interviewed
- Department representatives who will complete questionnaires
- IT staff providing information about current processes and issues they address.

The review will be conducted by a "review team" that can include an independent outside firm or an internal group that has appropriate skills (and time), selected by senior management. But in any case, there must be a project sponsor who owns the process and is responsible for directing the project team. The project sponsor is typically part of the senior management staff who is familiar with the stakeholders and their departmental functions, at least as they relate to the overall business and the IT support department.

Step 1: Project Initiation and ITIL Review

The first step in the five-step approach is to conduct a project initiation session. The initiation session should begin with the project sponsor and the review team. It will include an overview of the project tasks to be performed, a decision as to who will participate in the project, data and documentation that will be collected, the project timeline, and deliverables at the end of each step in the process.

Participants will attend a meeting together so that everyone becomes aware of the project plan, and is informed of everyone's roles and responsibilities. Participants will have an opportunity to provide input to the direction of the project and any specific issues and concerns that they may want addressed.

A review of ITIL processes will serve as an educational exercise and provide a specific framework for the interviews, questionnaires, and evaluation of current processes that follow. It will be the project sponsor's responsibility to help define which of the service management ITIL processes will be reviewed. For example, the sponsor may focus only on Service Support processes—Incident, Problem, Change, Configuration, and/or Release Management. Or, it may be decided that the Service Delivery areas are to be evaluated (Service Level Management, Financial Management for IT Services, IT Continuity Management, or Capacity and Availability Management.)

Deliverables from this step include a definition of project roles and responsibilities, documentation to be collected and reviewed, people to be interviewed, and a project timeline.

Step 2: Structured Interviews with Management

Interviews are a key step in developing a baseline for assessing current IT service management operations, understanding business needs to be addressed, and ultimately meeting project expectations. The project sponsor has already decided on how many interviews will take place with stakeholders from various departments that either direct the service management function or depend on its proper functioning.

Interviews are always more successful if you've prepared structured questionnaires and distributed them ahead of time to the participants. This allows interviewees to prepare. Questionnaires provide a more consistent way to score or evaluate the results across all interviews. Topics for the interview might include department overview and mission, service management requirements, critical success factors that the review team should incorporate into the analysis, and the interviewee's experience with the current IT support function.

The information gathered during this step should be factored into the evaluation of the current state of service management and where there are "gaps" between that state and the desired service management operation.

Deliverables from this step might include interview notes, key issues, and processes that should be evaluated by the review team.

Step 3: Observation and Data Collection

Observing the IT service management function is a key responsibility of the review team. This will provide a high level "feel" for whether there are orderly transitions between IT support processes. For example, the review team should note information on call flows, problem management, change management, and other ITIL processes being reviewed during the assessment. The following, among other items, will be of particular interest:

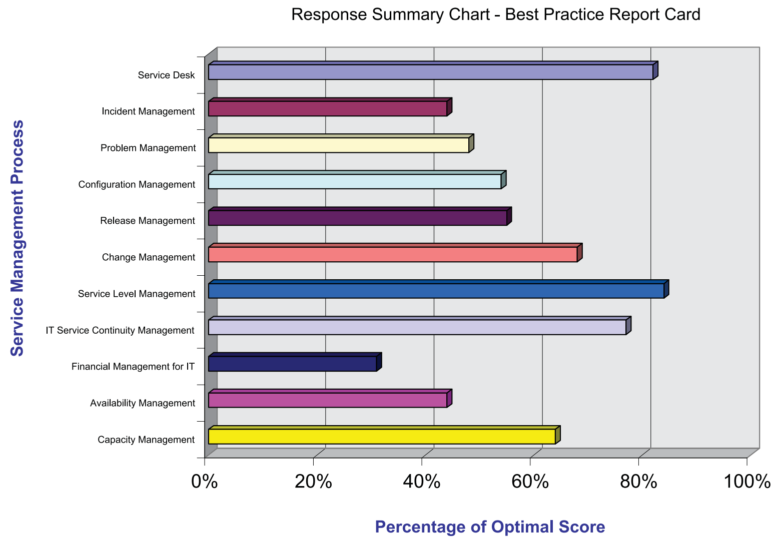
- How calls for support are reviewed and logged in the help desk system
- Call escalation procedures
- Process for notifying customers about their issues and resolutions
- How issues are resolved and documented
- How issues relate to requests for change and how they are communicated and tracked

I also recommend the use of questionnaires with respect to each of the ITIL processes being reviewed. The questionnaires should be based on ITIL best practices and should be distributed to the project stakeholders designated by the sponsor. For example, the Change Management questionnaire should have specific questions such as:

- Is there a formal Change Advisory Board (CAB)?
- Are priorities and categories for change well-defined?
- Is there a formal process for emergency changes?

I recommend a scoring system that allows participants to provide their sense of how well the organization meets a particular ITIL process. The results of the questionnaires should be tabulated to provide an overall score, which will provide the baseline for the organization's conformance to ITIL.

Deliverables from this step include observation notes, specific issues uncovered during the observations, questionnaire results, and a baseline from which to measure the "GAP" between the current state of IT support and a desired state that includes ITIL best practices and management's direction uncovered during the interviews.



Step 4: Gap Analysis

The gap analysis phase will help identify the variance between business requirements and the current state of your service management operation. By leveraging key information gathered in the interviews, observations, and questionnaires, it becomes possible to identify and document specific "gaps" between best practices and existing procedures.

Analyzing and prioritizing these gaps will allow for the development of a customized action plan that addresses the organization's needs while applying industry best practices.

The review team should consider interview and observation notes, combined with questionnaire results to document a baseline for current processes. This same data should also be analyzed for comparison to key objectives of the organization. Together, this information will allow the team to document the variance between where the organization currently is and where it should be, based on business requirements and best practice ITIL processes.

Tasks in the gap analysis may include:

- Review interview notes and identify and prioritize goals and requirements
- Analyze survey results and consider trends and major gap areas
- Review observation notes and documentation, and assess current state of the service management operation

The deliverable will be a document that provides an analysis of each of the ITIL processes under review and the gaps that have been identified. These gaps will provide the basis for the last step, in which specific recommendations and an action plan are provided to the project sponsor.

Step 5: Action Plan

The gap analysis is the basis for the recommendations for addressing deficiencies and weaknesses related to ITIL best practices. The action plan should be specific to each of the processes under study. I recommend that the planned actions and tasks be grouped according to timeframe for completion.

Anyone who has participated or managed this type of project knows that management buy-in is important to the success of the ongoing improvement program. To this end, make sure that the review team considers initial improvement tasks that combine low cost, high benefit, and high probability of success.

The key deliverable will be an action plan that will be a practical, living document that includes:

- *Gaps and issues identified*
- *Recommendations and action items*
- *Benefits to the organization*

This action plan, together with project documentation, will provide a detailed roadmap for enhancing the IT service management function according to ITIL best practices.

Steve Dreyer is CEO and founder of SMA Management Systems, an IT service management consulting firm and systems integrator, incorporated in 1984. The firm specializes in IT assessments and best-in-class service management product solutions for help desks, asset management and reporting. The company's Web site is www.smasystems.com *and e-mail address is* info@smasystems.com.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WELCOME Help Desk Manager, *Now What?*

This is the question that has haunted all new help desk managers. With over fifteen years of experience in IT and seven years of that directly in help desk, I'm still working on it.

— *by* Xavier Idrovo —

Every company, regardless of industry, has different methodologies and IT structures that impact how you build up and maintain services within your help desk. This article helps to create a simple checklist of what to establish in order to deliver an ITIL-based *service desk*.

People

First day on the job and now what? Get to know your staff. Your staff is the most important element of the help desk. These individuals not only perform the work, they know the current layout of the environment. Get to know them, get to understand how they work today, and record what is done correctly and what requires improvement. Depending on your staff size, interacting with everyone may be difficult, but it's important that you establish a relationship with your staff. Use this time to absorb as much information as possible. Answer their questions but refrain from taking over the conversation.

Your staff is just the beginning, meet with your fellow managers of infrastructure. It's important that you understand what each support group does and how they are related to the help desk (i.e. help desk tickets, call escalation etc.).

Last but not least, meet with your customers. Keep the meetings simple—your goal is to asses your current state. Understand what is wrong (if anything) and what their needs are. This is an important step. Many help desks strive to provide a certain level of support without discussing this with the business. This leads to a losing battle as it is not in line with the needs of the customer.

Now that you have met with your team, your customers, and Second Level support groups, you have a good understanding of where you are today and where you want to go. You should be able to establish a goal for your help desk. Using ITIL is the best approach for this. It's important that you also identify your position in the maturity model as outlined in HDI's 2003 white paper, "Maturity Model for the Support Industry." This will help you to pick up where the desk is at now and identify whether you need to be tactical or strategic in your efforts.

(Case study: at a major investment firm, the customer's goals for the help desk were to provide a very low time to answer and a low abandon rate. At another yet smaller institution, the customer's goal was high resolution rate from the help desk.)

Data

I have found in my experience, that the best way to understand how your desk is currently performing and to identify gaps, is to take over and manage the data. Determine the key parameters that are important to the business. Here's a few from my own charts:

- Number of calls answered
- Number of calls abandoned
- Percent answered
- Average speed to answer
- Number of incident tickets
- First call resolution
- Tickets closed by the help desk
- Customer satisfaction rate
- Staff availability

The key is to be able to derive the data accurately and consistently. If you cannot create the report to produce this metric, then you have identified another possible gap in your help desk. I have found that garbage in yields garbage out; therefore, analyze your current data, review your reports, validate, and most important, review with management on what is important to them. Establish weekly, monthly, and yearly reports. The key to reporting is to help manage SLAs and identify possible trends. This is extremely helpful if your desk is in the proactive stage in the maturity model.

(Case study: I generate this data and post for my team and management to view. I keep this in a table format which makes it easier for me to see the results month-to-month and gives me a high level view of the overall performance of the desk.)

Process

Just like the previous two sections, *process* plays an important role in developing a mature help desk. By using the best practices mentioned in ITIL service management, you can develop meaningful, effective, and measurable processes which will go a long way and be a benefit to your desk and your customers.

I generally prefer to wait until I have a good handle on my staff, the requirements from my customers, and an understanding of the data before I look to improve on processes. Review all written and non-written procedures; this is a good time to develop help desk process and procedure documentation. This will serve as a guide for all help desk staff members to follow and a good way to introduce new employees to the desk. The key factor to an effective help desk is to have defined repeatable procedures. This way, every customer gets the same high level of service regardless of who answers the call. Don't forget e-mails or any other method of communication your business uses to get in contact with your help desk.

Developing your processes and procedures can take months to complete. Start small, create an overall index of services provided and tackle each one independently. Any improvements should be documented separately and reviewed at a later time. Often times, we identify an improvement effort only to realize the impact is not completely realized. First, establish a *current state* then work to improve where needed. Now is also a good time to create policies if none exist. It's important to understand the differences between processes, policies, and procedures; there are many articles available on this.

(Case study: At a major investment house, the creation of a help desk procedures document was key for new members where we had twenty-five call agents. The manual was also reviewed monthly for changes. This also helped tremendously during internal audit reviews.)

Tools

Last but not least, tools—*or technology*. I generally don't rely heavily on this since many organizations either don't have plans, or budget to implement, or change the current tools used at their help desk.

The first thing to do in this arena is to review all the tools in use by the help desk. Identify them and what services they provide. Are they fully in place? Will an upgrade help in providing improved services and can they be upgraded if necessary? It's difficult to present the need for new tools or even upgrade if there is a cost associated with it. Another reason why I leave this for last is that by the time I have reached this phase, the help desk has already undergone several service enhancements. My approach to management is to use this investment to help improve overall services.

Don't simply throw out the old and bring in the new. Contact your sales agent regarding the tool. If you have a maintenance agreement, you may be eligible for free upgrades or other free tools to help you.

Summary

Managing the help desk is not as straight forward as one may think. There are several variables to consider: the size of the company, the needs of the customer, and not to mention culture (which we haven't touched on but is part of the PEOPLE strategy).

The help desk is constantly changing and improving. As IT evolves, so does the help desk—into what ITIL defines as the service desk. By following the ITIL best practices guidelines you are well underway to an effective service desk.

Xavier Idrovo has over 20 years of solid experience in the IT support industry holding management and engineering roles. He has managed major local and global support centers for UBS and other fortune 500 companies in the financial investment field. Currently working as the service desk leader at New Jersey Manufacturer's Insurance Company, he is working on an ITIL based improvement initiative which includes incident management, change, and configuration management. Mr. Idrovo has been ITIL foundation certified since 2000 he also has his Help Desk Manager Certification from HDI.

HDI congratulates all of the candidates who have passed their HDI certification tests in February and March 2006!

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Helping Your Newest Analyst Blend In

by Paulette Vandenbrande

No matter how small or large your support desk, helping your newest team member blend in with the team is very important. If a person does not blend in, chances are that they will either leave or will be unhappy or disgruntled, which may cause team morale issues.

The process of having a new member blend in begins at the interview level. Make sure you ask various team play related questions during your interview. Consider having your candidates go through a peer interview where the supervisor or manager is not present. This is where his/her peers will be able to ask candid questions and will be able to share their expectations in relation to team play.

Once you've hired your new analyst, consider assigning a teammate (or having a teammate volunteer) to be the new analyst's mentor for three months. During this three-month period the mentor will help train, answer questions, and simply be there to guide the new analyst. Consider developing an evaluation that will be completed by the protégé at the end of the three months. In this manner you will get feedback and can coach future mentors.

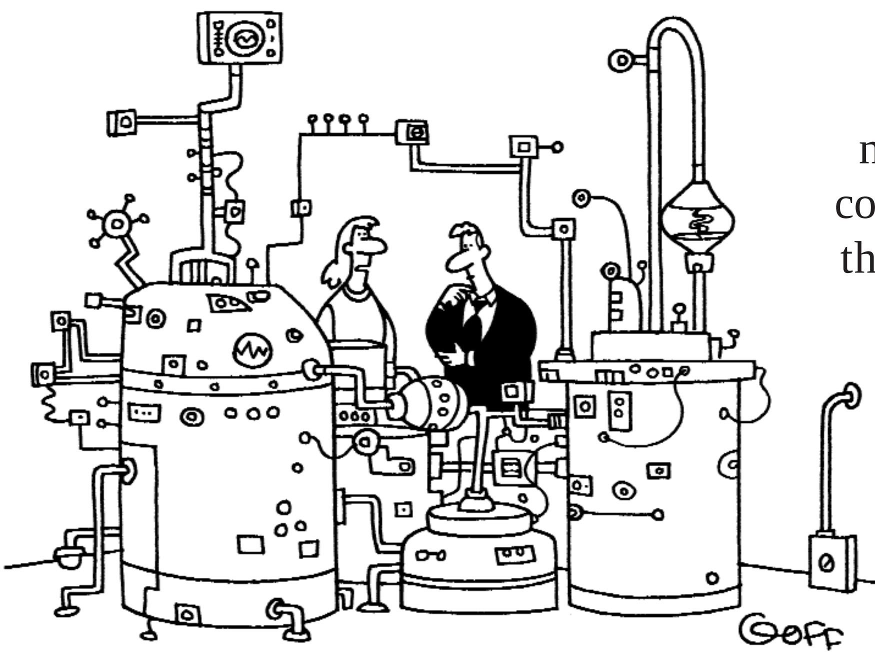
To continue with the process of helping the new analyst blend-in, divide training amongst various team members, so that they too will have time with the new analyst. Training becomes a team project and the new analyst gets to know more of his/her teammates.

Consider having a team building exercise at your meetings which not only will help the new analyst see how much fun it is to work with the team, but which will continue to strengthen existing team work.

Encourage the new analyst to ask questions, to express concerns, and to give you or his/her teammates feedback on current processes. It is surprising what great ideas "new blood" can bring to a team. Ask him/her to share his/her ideas with the team and if possible, implement.

We try to end each of our team meetings with an inspirational reading. At the first meeting your new analyst attends, assign him/her to do the next reading.

Paulette Vandenbrande is supervisor of the IT customer support team at Meridian Health, a healthcare system based in Wall, NJ. She has eight years leadership experience in the IT support industry. She currently serves as HDI NJ Chapter VP of Communications, Newsletter Editor, and Co-Webmaster.



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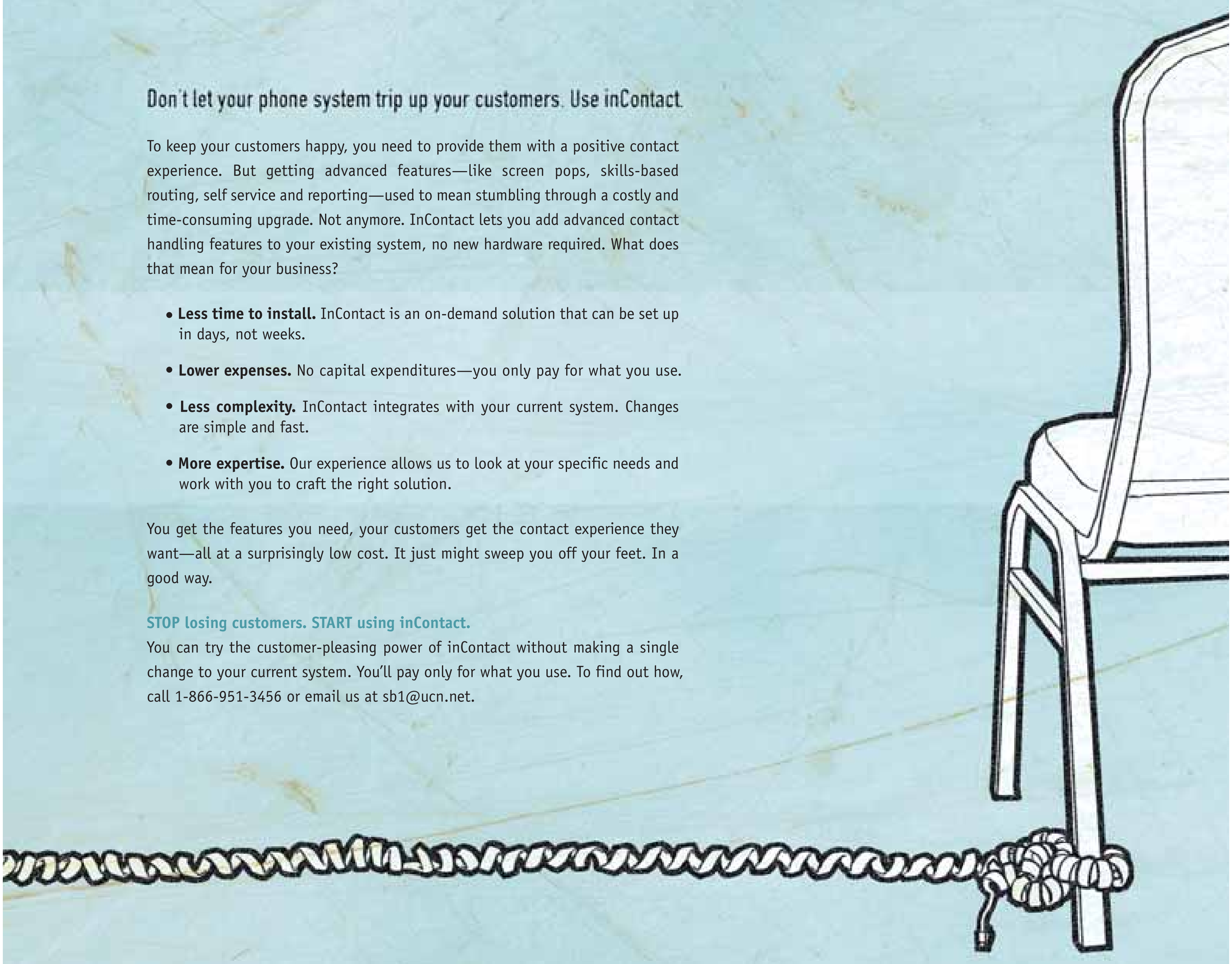

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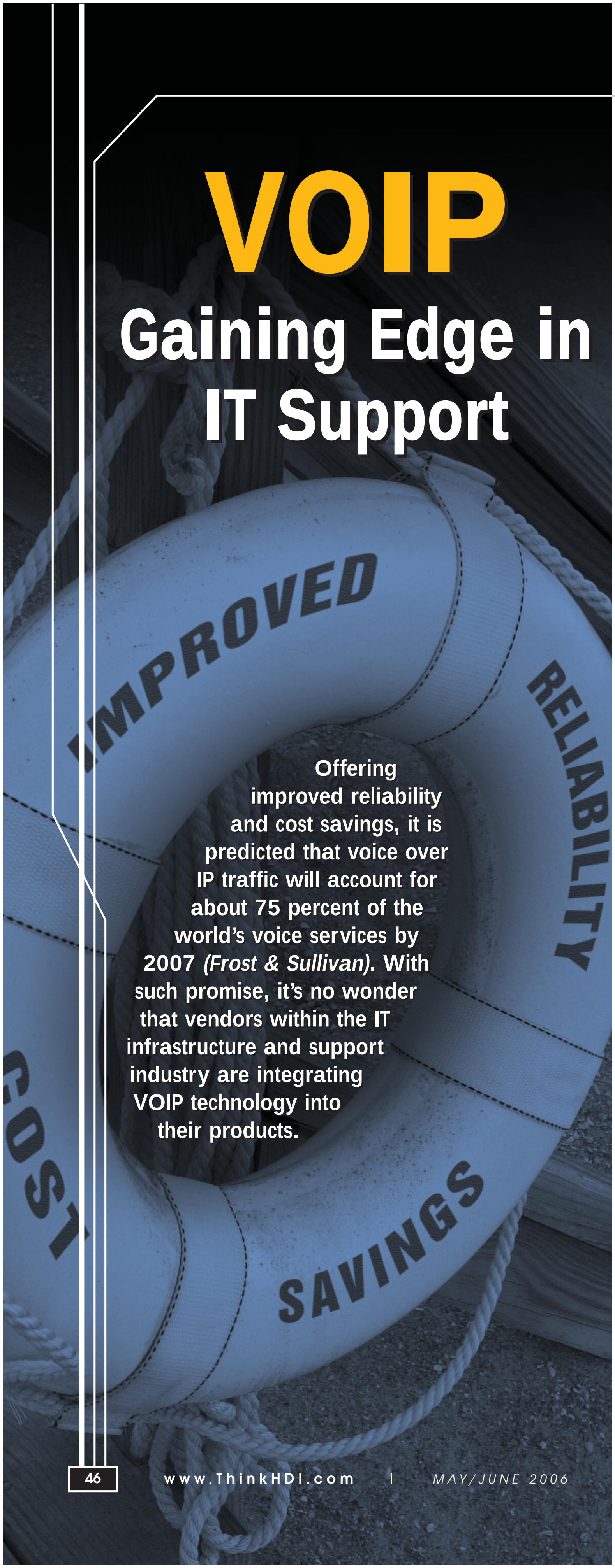

Offering improved reliability and cost savings, it is predicted that voice over IP traffic will account for about 75 percent of the world's voice services by 2007 *(Frost & Sullivan)*. With such promise, it's no wonder that vendors within the IT infrastructure and support industry are integrating VOIP technology into their products.

In discussing trends with vendors at our annual conference and expo, which took place in Nashville this March, VOIP technology was high on the radar. So, what is the hype about and what exactly are some advantages that VOIP can bring to the service desk?

Jan Johnson,
Vice President Marketing, UCN
Let's bust a myth first. Businesses can take advantage of many of the new VOIP features and functions without converting their own facility to VOIP—by working with a hosted contact handling solution provider. Today, hosted solutions can supplement almost any onsite phone system—old, new, or IP—with advanced contact handling features. It's your choice.

Now, let's step back and talk about how these hosted, VOIP-based services can benefit the user. It's all about delivering a satisfying contact experience at an affordable price. Today, hosted services are available to smaller enterprises—those with five to fifty reps—enabling them to get their costs down through the use of productivity-enhancing, advanced contact handling features—self-service menus, skills-based routing, real-time reporting, real-time monitoring and recording, integration with a CRM database, screen pops. Typically, a rep in a smaller operation without advanced features costs between $41 to $20 per productive hour of rep time. A rep within a larger enterprise, of 250+ seats, which has access to these services, costs in the range of $13 per hour of productive time per rep.

Another advantage: A hosted solution enables support for at-home workers. Managed calls can be tracked, reported on, and monitored just like in-house activity. Your operation is no longer bound by geography when it comes to hiring qualified workers who live in lower-cost regions of the country. A hosted VOIP-based solution gives the smaller enterprise the option of outsourcing the technology and keeping the knowledge worker on-payroll, while managing their costs.

James A. Puchbauer,
Senior Marketing Manager, FrontRange Solutions
Much of the promise of VOIP may not come from extending the walls of the help desk with VOIP but in the simplicity and affordability of the application integration these new VOIP systems are capable of. When technology

can offer voice applications interwoven into the line of business applications resident on the IP networks, for the first time affordable integration is made possible which significantly lowers the cost of operations and improves customer interaction. Some of the best examples can be found in the help desk environment.

One high impact example is automated or self-service password reset requests. According to Gartner, "How-to questions" make up 27 to 43 percent of help desk contact volume, with a significant proportion represented by password reset requests. An IP-enabled help desk offering self-service, allows your customers to do things like reset their own domain passwords with a simple phone call. Users confirm their identity by dialing in a keyword that is kept against their profile. A new password is automatically generated and read back to the caller over the phone. Additionally, an e-mail notification is triggered to verify the password is reset and a service ticket is automatically created to acknowledge the self-service transaction. This one application can dramatically impact staffing workloads by reducing repetitive transactions requiring a low skill level and increase the satisfaction of your service constituents by offering your clients and employees quick and easy resolution of common issues at any time of the day or night, with minimum analyst involvement.

No longer complex and unaffordable, these solutions can now be implemented even in the SMB market space. All made possible by combining the integrated components of the VOIP systems like Interactive Voice Response (IVR), speech to text, call routing, and unified messaging with the help desk and service management software, resulting in dramatic improvements in customer interaction management.

IT employees aren't the only ones who need answers. Lori Samolyk redefines customer service and explores the benefits of a multifunctional service desk.

Help vs. Service

The term 'help desk' was coined when organizations needed a way of helping their employees with IT problems. An IT help desk's two basic functions were to log user queries and mobilize relevant technicians to attend to the problems.

But, of course, many other divisions in a company—such as accounting or human resources—have a need to help employees with specialized tasks. So, they provide facilities that function as help desks, though they are not necessarily called that.

And then there's the more recent call or contact center, which was developed primarily to help external customers resolve queries about an organization's products or services.

That's a lot of different people working in or for one organization, each with responsibility for a link in the chain of what is, in essence, customer service. Any part of an organization that functions less efficiently than it should, negatively impacts customer service. Therefore, anyone working on resolving impediments to efficient functioning is working on customer service—whether he or she is sorting out a technical e-mail problem or helping an employee access maternity leave.

In other words, the realization is dawning that a 'service' desk that consolidates all elements and types of help provided to internal and external customers would not only save money and boost organizational performance all round, it is actually the only logical focal point for the seamless execution of one's business strategy.

There's been much talk over the years of the best ways of getting employees, suppliers, and business partners aligned with one's business strategy in order to have the whole value chain operating as one coherent, consistent organism focused on a single objective. The early help desk carried the seeds of such an organism and, having evolved into the service desk, it has become the heart of the mature organism.

Help that Isn't Obvious

In today's electronically-driven operational environment, IT is the medium of both operations and service delivery. If the IT infrastructure is not working effectively, it will have an equally direct negative impact on an organization's whole operation, from product delivery to billing to customer service.

Best practice methodologies such as the Information Technology Infrastructure Library (ITIL) provide a flexible structure for the escalation process, thereby *by* Lori Samolyk

The *Evolution* of the Service Desk

Yes, the help desk is dead. Well, at least in the sense of simply being a place for people to call for help on technical issues. It has now evolved into an integral part of the way an organization delivers service, whether internally to staff or externally to customers. It has become a service desk—with a different way of approaching the provision of 'help' or assistance to whomever asks for it.

improving the efficient running of the service desk and at the same time driving up customer satisfaction.

ITIL offers a relatively simple method of putting in place service management processes and provides a streamlined way of managing the IT infrastructure. Critically, it also improves service delivery by providing a common language and terminology for both users and providers.

In addition, it is focused on enabling organizations not just to log calls but to proactively resolve them. This reduces the time it takes to resolve issues, thereby increasing customer satisfaction and decreasing the overall cost of support.

The thing to remember, though, is that using technology is one of the easiest ways to resolve issues in areas other than IT. Knowledge management, for instance, is most easily achieved using IT. But it impacts every business discipline, because knowledge management is about learning from your mistakes.

Similarly, issues like remote management of IT, which reduces the number of human resources needed to resolve user difficulties as well as the time involved in such resolution, cuts costs and boosts efficiencies across the organization. So does the slimming down of IT infrastructure—simplifying the number of process and equipment variables that can hamper operations, as well as reducing the organization's overall overhead burden.

In other words, using mature service desk principles and solutions at the IT level enables you to get the right information to the right people in time to do their jobs effectively. It therefore positions you to consolidate the way you deliver service to your internal and external customers regardless of the business discipline involved. It gives you the kind of strategic advantage that is very difficult to achieve by any other means in any other area of your business.

Lori Samolyk is a Senior Product Manager at FrontRange Solutions, where she has helped bring the award-winning HEAT® and IT service management products to market. Now in her third year with FrontRange, Lori previously held global technology marketing roles at Accenture and PriceWaterhouse Coopers.

Introducing New Features for Membership on the HDI Web Site

If you haven't stopped by the "Members Only" area of the HDI Web site lately, check it out to take advantage of the many valuable resources we've created just for you. Here's a sample of what's available:

Interactive Library

HDI's Interactive Library is a brand new community tool that lets you share and collaborate on digital files. You can search, browse, rate, comment on, edit, resubmit, download, and upload files. There's a wealth of information available at your fingertips within the HDI library...access online from the "Members Only" tab of our Web site.

Blog

The HDI membership blog keeps you up-to-date and in the HDI loop. Read the latest news, ideas, events, and much more all happening within the HDI community. Found out if Ron will be traveling to a location near you to discuss HDI's new CSI tool. This exciting new tool is a user-friendly, secure, web-based survey tool that automatically sends surveys to customers who have recently contacted your support center. Find out more on page 37 or by visiting the HDI blog on the "Member's Only" page of the HDI Web site.

Job Board

This great new feature connects companies that are hiring in the service and support industry with the largest, most qualified audience of service and support industry professionals: you! You can access the Job Board from the "Members Only" tab on the HDI Web site. And, if employers post a job now they will receive 25 percent off their job posting.

New and Improved—Practices/Salary Surveys

We're listening! Based on the feedback from our members, we've redesigned our surveys. The new surveys are shorter and more manageable—our goal is to keep the surveys to less than 15 minutes per survey. Find out more about the survey redesign on the HDI blog.

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Forrester Research has recognized BMC's service desk management solutions as leaders in both large and small enterprise service desk tools.[1]

Learn more at www.bmc.com/leader

[1] Forrester Research, Inc., "BMC Remedy Help Desk and BMC Magic Lead for Both Large and Small Enterprise Service Desk Tools," C. Gliedman, February 2006

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