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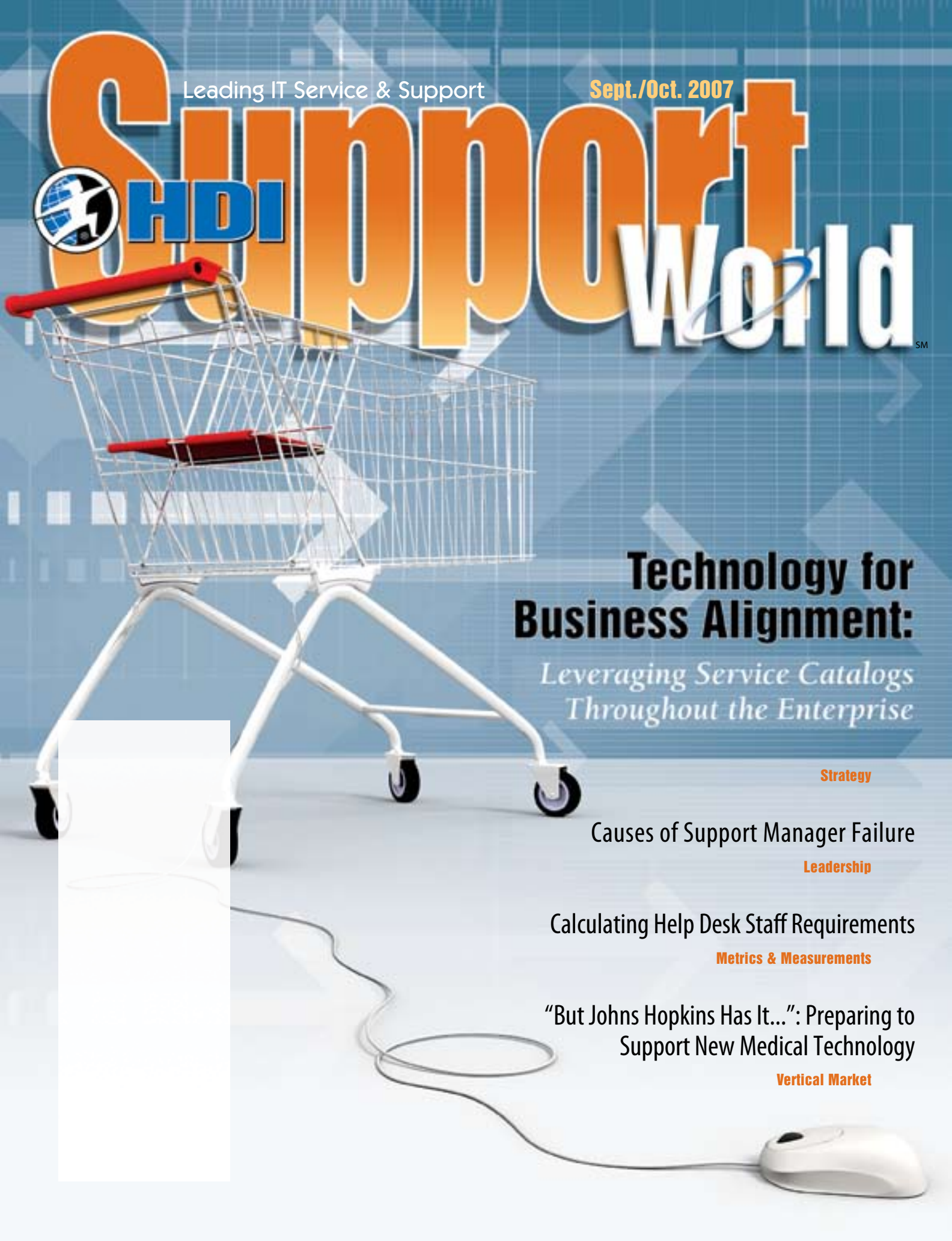

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HDI SupportWorld℠

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letter from the EDITOR

HDI members and *SupportWorld* readers,

This edition, the focus is on service level management, ITIL®, and leadership. After attending a session during our annual conference in Las Vegas earlier this year, you brought to my attention the difficulties many of you were having in your ITIL endeavors. I will be including in this issue and future issues, helpful articles and tips on how to take on ITIL and achieve the most of this best practice framework.

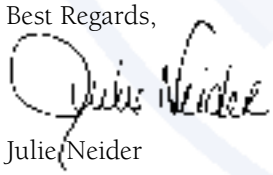
One area of concern in particular was the CMDB (configuration management database). You voiced your difficulties in building, maintaining, and managing the CMDB, not to mention selling the CMDB to those directly impacted by it and those now responsible for its maintenance. In Tim Jarrett's article, "Building a CMDB in 5 Steps," he touches on some of the challenges and the steps to take to more smoothly set up your CMDB and the benefits you gain by doing so.

Another great item for your support center to think about getting (if you don't already have one) is a service catalog. More companies are turning to service catalogs to fulfill service requests in a timely, cost-effective manner. Service catalogs have many benefits, but ultimately provide a list of all available products and services to an organization's (or department's) customers. John Sundberg tells us how to best leverage a service catalog for success in his article on page 16.

Accountability has become a necessity, due in part, because of the numerous scandals and organizational failures that have cost many their life savings, their jobs, and even their lives. So what causes management failure and what can we do to prevent it? Robert Last takes us inside support management failure and explores what brings us to lead our team down the road to failure, or down one of success.

As we continue to serve you, the HDI member, and the entire support community, I challenge you to set your support standards higher, deliver exceptional service to your customers, and continue down the path to success.

Best Regards,



Julie Neider

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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

HDI receives many questions from its members regarding performance metrics goals.

"Where should our customer satisfaction rating be?"

"What is the best practice rate for First Call Resolution?"

Managers in any industry must address similar questions and, while these are very good questions, they are not that easily answered.

Ready, Set, Goals!

by ***Jenny Rains***
Research Analyst for HDI®

Many factors should be taken into consideration when setting goals for a support center's performance metrics. For example:

- What are the organization's business goals?
- What resources are available for the support center?
- How is the performance being measured?
- What is the support center's baseline for this metric?
- What goal would be realistic for this specific support center?

The following analogy is appropriate to stress the importance of personalizing goals for each individual support center. Let's say I was at a track meet and someone approached me to help their team determine how quickly they need to run a race. If that was the only information that I had, I might simply give them a time that I have seen work before: one minute and eighteen seconds. Would this be a good goal for them?

Actually, one minute and eighteen seconds is the standing world record for the Men's 4 x 200 meter relay run by Carl Lewis and his team in 1994. So, for many reasons, this might not be the best goal for the team. If I had asked some important questions before setting that goal, we might have come up with something that is more appropriate for them. Such as: "What is the team's ultimate goal?" "Which race are you running?" and "What level runners are in the race?" These clarifiers will help to set an aligned and realistic goal.

The most important place to start is to find out what the goal for the team is. Their goal might be to set a new world record, win the track meet, simply improve over last year's results, or even just go home with no injuries. Asking the team this question will help them align their performance to their overall goals. ***Similarly, aligning to the organization's goals and business plan is the first step in setting performance metric goals.***

It is also essential to know which race is being run. In the business world, this would be analogous to knowing what resources are available and what the support center's baseline level of performance is. In regards to resources, the team's goal time might be longer for one person running a whole race as opposed to a relay, in which four people each run a leg of the same length race. As addressed later, ***performance goals should be realistic. In order to make them realistic, the organization's resources, such as staff, time, and tools must be taken into account.*** For example, it is reasonable for a five person support staff with outdated technology to have an Average Speed to Answer goal that differs from a one hundred person support staff with current technology supporting the same customer demographic. The metric is the same, but the target is adjusted due to resources.

The length of the race is similar to knowing a support center's baseline on a specific performance metric.

Not all races and not all organizations are at the same starting point. The goal time for someone who is 100 meters from the finish line is obviously different than for someone who is a mile away. When setting the goal for a performance metric it is essential to see how the support center is currently performing. From this assessment, realistic goals can be created based on that starting point.

Part of setting and adjusting performance goals to be attainable, yet challenging, revolves around the knowledge of available resources, where the team is starting, but also knowledge of the team and the organization's maturity levels. Is Carl Lewis running the 100 meter dash, or is it a junior high P.E. student? Setting a goal for the junior high student of 9.8 seconds is not realistic. He should be striving more for the 19 second range. Knowing the maturity levels around which the goals are being set is another imperative factor in setting goals that are realistic for that specific support center.

Support centers differ on many factors. Some of these factors such as type of industry can be taken into account when comparing performance metrics results. When analyzing the preliminary Practices Survey data for 2007 such differences are noted. For example, when the two highest responding industries (healthcare and education) were compared on their phone abandonment rates, it was found that 68% of the education industry has an abandonment rate of 5% or less while 46% of the healthcare industry's abandonment rate is 5% or less. In addition, the preliminary data for these groups showed that 50% of the education industry has an average speed to answer for the phone of 10 seconds or less, while healthcare has 26% at 10 seconds or less. This might indicate that healthcare is not performing as well as education in general; however, healthcare is taking over 12 times the number of incidents education is taking. While staff sizes are somewhat comparable in the industries, based on their number of incidents, the industries differ in their allocation of resources. Therefore, performance metric goals must be determined accordingly.

This is an indication that performance metrics goals are not a "one size fits all" concept. Different factors contribute to different results as well as to varied levels of progress. So, an outside source might provide a performance metric goal for a support center (e.g., one minute and eighteen seconds), but that might not be the more suitable goal for the team. Someone who knows the team's hurdles needs to determine the team's goals.

Causes of Support

"A man who refuses to admit his mistakes can never be successful. But if he confesses and forsakes them, he gets another chance."

–Proverbs 28:13

Manager Failure

by ***Robert Last***

Introduction

As much as most of us hate to admit it, we have all failed or will fail at some professional or leadership endeavor at some point in our careers. If you haven't or you think you haven't failed, stop reading now and seek professional help because you're probably deceiving yourself. Failure, however, is not inevitable; it makes itself known for specific reasons, but these reasons usually aren't covered in our college, graduate school, and professional development classes. If we learn about failure at all it is usually by watching a space shuttle explode, seeing storm levees break and flood a city, or by watching FEMA trying to deliver water to thirsty people. Failure hurts and because it hurts we avoid it like a trip to a dentist on a beautiful day; it must be part of being human to avoid things we don't like. Understanding failure is an important element of success because, "Examining the causes of failure eliminates mistakes the next time around and allows you to look at alternatives. Those alternatives can lead to a positive and creative solution to the problem at hand."[1] In this article, I'll discuss some of the common causes of failure in the spirit of the saying, "For-warned is for-armed."

The Causes of Failure

There isn't enough space in this issue of *SupportWorld* to list all of the studies and books that discuss failure, but a small sampling reveals some interesting theories.

Let Success Go to Your Head

In *Why Smart Executives Fail and What You Can Learn From Their Mistakes,* Sydney Finkelstein, a professor at Dartmouth's Tuck School of Business, conducted interviews with 200 executives about failure and found that "neither ineptitude nor greed are among them."[2] He identified five factors that are common to business failure:

1. Success that breeds delusional thinking;
2. Companies that are successful in their marketplace act as an advertisement for others to enter the same arena;
3. Success breeds arrogance;
4. It's easy to let your guard down when you are awash in profits—"…there is a common failing of mankind, never to anticipate a storm when the sea is calm;"
5. Success creates its own momentum that in the scheme of things is remarkably difficult to maintain.[3]

Lose Touch with Reality

In the excellent book, *Mistakes Were Made (but not by me),* Carol Tavris and Elliot Aronson discuss the unique human ability to practice self-deception and self-justification and how it impacts organizations and the people in them. Think of Pearl Harbor, Enron, Adelphia, and any other organizational failures and scandals and ask yourself how these failures and scandals came about. In one chilling passage, the authors discuss the observation of Albert Speer, Adolf Hitler's architect and Armaments Minister who wrote in his autobiography, "In normal circumstances people who turn their backs on reality are soon set straight by the mockery and criticism of those around them, which makes them aware they have lost credibility. In the Third Reich there were no such correctives, especially for those who belonged to the upper stratum. On the contrary, every self-deception was multiplied as in a hall of distorting mirrors, becoming a repeatedly confirmed picture of a fantastical dream world which no longer bore any relationship to the grim outside world. In those mirrors I could see nothing but my own face many times over."[4]

In contrast, they also discuss the leadership skill and self-awareness of President Abraham Lincoln, as described by Pulitzer Prize-winning historian Doris Kerns Goodwin in her book, *Team of Rivals,* "…Abraham Lincoln was one of the rare presidents who understood the importance of surrounding himself with people willing to disagree with him. Lincoln created a cabinet that included four of his political opponents, three of whom had run against him for the Republican nomination in 1860 and who felt humiliated, shaken, and angry to have lost to a relatively unknown backwoods lawyer..."[5] Admittedly, President Lincoln is, well Lincoln, but his approach remains valid for any leader seeking to travel the path of success.

Failure to Learn

In January of 1942, German submarines began an assault on the eastern coastal shipping lanes of the United States. By the end of the Second World War, the German U-boat fleet would sink 440 ships totaling 2,740,000 gross tons; mines, surface ships, aircraft, and miscellaneous enemy action boosted the toll to 538 ships. U.S. merchant seamen killed or missing totaled 5,579. The Port of New York was closed for three days in November, 1942 by U-boat mining; Chesapeake Bay was twice closed.[6]

What is less well-known is that the U.S. Navy had been warned by it counterparts in the British Royal Navy that the German U-boats were preparing to launch an assault on the east coast of the United States. The British offered their hard-won advice and willingness to share their painful experiences in hunting U-boats in the North Atlantic. The U.S. Navy in the person of its commander, Admiral Ernest King, failed to learn what the Royal Navy had leaned years before—the centralization of all information about U-boat movements into one location, the Operational Intelligence Centre, was the only way to manage the many dimensions of the fight against the U-boats. It was not until May, 1943, that Admiral King finally established a similar organization—the U.S. Tenth Fleet—to analyze intelligence information and report on the movement of U-boats in United States waters.[7] For over five months, the German U-boats hunting ships in the coastal waters of the United States did so without facing a coherent or significant threat to their operations from its new enemy, the U.S. Navy.

What Admiral King and his staff failed to do was ask themselves a series of questions such as:

- What results were you expecting? What actually occurred?
- In planning, did you consider all possible obstacles? Were any obstacles dismissed as unimportant? If so, why?

- Can the problem be rectified?
- Did you collect input from the right people, ask the right questions?
- What can be salvaged? Many problems can be resolved, although many people quit rather than work toward a solution.
- Do you know when to stop what you're doing because it is not working?
- What have you learned from the failure? How can your organization grow from its failures?

Failure to Anticipate

Support professionals are charged with taking reasonable precautions against the actions, policies, procedures, and decisions that may bring harm to their customer's operations. Preventing such occurrences is just one of the many reasons that the Information Technology Infrastructure Library® (ITIL) has elements such as change management and release management. Anticipating the possible side effects of different actions requires looking at one's environment realistically and positioning people and resources to respond to the most likely eventualities.

By far, one of the chilling examples of anticipatory failure was the 1986 space shuttle *Challenger* explosion. It is now well-known that engineers at both NASA and Morton Thiokol were not only aware of the potential for a disaster, but had vocal critics prophesying that such a disaster not only could happen, but would happen. The senior management at NASA and Morton Thiokol had come to see the shuttle flights as so routine that they easily deceived themselves about the potential danger. The *Report of the Presidential Commission on the Space Shuttle Challenger Accident (The Rogers Commission)* observed that "NASA and Thiokol accepted escalating risk apparently because they "got away with it last time."[8]

More recently, the major effects of Hurricane Katrina were predicted during a tabletop exercise conducted by FEMA called Hurricane Pam, "The Hurricane Pam exercise reflected a recognition by all levels of government of the dangers of a catastrophic hurricane striking New Orleans."[9] Knowing when to adapt your support structure is a combination of on-going analysis, good judgment, and a matter of choice. It is advisable to prepare for as many potential hazards as possible and follow the old saying, "Hope for the best, but prepare for the worst."

Failure to Adapt

Failure to adapt reflects what historians Eliot Cohen and John Gooch describe as "…a consequence of systemic and organizational weaknesses and not individual shortcomings."[10] In the support world, where the emphasis on process is intense and grows almost daily, resistance to change is almost guaranteed and the opportunities for adaptive failure are strong. It is common for support managers to have spent years building a support structure and they often, too quickly, dismiss the possibility that this structure may need to be changed. The question becomes, "When is it necessary to adapt, change, or update an existing structure or operational method to 'new' realities?"

The easy answer is, "Change when you need to change" and "Adapt when you need to adapt."[11] The triggers for adapting are:

- **A deviation from baseline performance**. The baseline involves knowing what your performance goals are and being aware when they are not being met;
- **A breech in service level agreement** or operational level agreement goals. Service level management is the heart of the services that a support center provides. If baseline performance is slipping, SLM breeches will not be far behind;
- **Staff and customer warnings**. Talk to staff, customers, and supervisors and assess their perceptions of the support center's performance. The support center performance numbers may not indicate a problem, but often the daily experiences of staff and customers can experience and even sense changes in service attitude before they are reflected by statistics—look for these subtle messages.

Knowing when to adapt your support structure is a combination of on-going analysis of metrics, SLM goal adherence, antidotal input, observation, a little commonsense, and an ability to look reality squarely in the face. As a practical matter, construct your reporting and intelligence systems and use them to make conscious decisions about taking courses of action.

Conclusion

These causes of failure are a part of business life that most of us want to deal with. Like paying taxes early, admitting a mistake to a spouse or a boss, and going to a dentist when a tooth hurts, most mangers avoid dealing with these chores as long as possible. As television commentator Ben Stein once observed, "Not too many problems go away by themselves"[12] and when the ostrich buries its head in the ground, it gets eaten.

1 *The Smart Manager's FAQ Guide-A Survival Handbook for Today's Workplace,* Rex P. Gatto, (San Francisco: Jossey-Bass/Pfeiffer, 2000) p. 39.

2 "Understanding Failure," *Across the Board, July/August 2003, p. 27.*

3 URL: http://mba.tuck.dartmouth.edu/pages/faculty/syd.finkelstein/causes.html#1 (Book Excerpt: "Early Warning Signs of Failure,") Retrieved on August 9, 2007.

4 *Mistakes Were Made (but not by me-Why we Justify Foolish Beliefs, Bad Decisions, and Hurtful Acts*, (Orlando, Florida: Harcourt, Inc, 2007) p. 65.

5 *Op cit.* p. 66.

6 "The Price of Admiralty," URL: http://time.com/time/magazine/article/0,9171,797566,00html Retrieved July 30, 2007.

7 *Military Misfortunes—The Anatomy of Failure in War,* Eliot A. Cohen and John Gooch, (New York: The Free Press, 1990) p. 29-94.

8 *Report of the Presidential Commission on the Space Shuttle Challenger Accident,* June 6, 1986, p. 148. URL: http://history.nasa.gov/rogersrep/genindex.htm.

9 *A Failure of Initiative-Final Report of the Select Bipartisan Committee to Investigate the Preparation for Response to Hurricane Katrina,* Report 109-377, February 15, 2006, p. 81. URL: http://www.gpoaccess.gov/serialset/creports/katrina.html.

10 Cohen and Gooch, *op. cit.,* p. 163.

11 Adapted from "Why Support Manager's Fail," Robert S. Last, Support Week Magazine, June 2, 1999.

12 Ben Stein Commentary, *CBS Sunday Morning,* June 10, 2007.

Robert Last *has over eighteen 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.*

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Technology for Business Alignment: Leveraging Service Catalogs Throughout the Enterprise

by **John Sundberg**

Business service requests have always been made, in one form or another. Every service group in an organization gets requests from its internal and/or external "customers." Whether it's a newly hired employee requesting a workstation assignment, a sales person requesting marketing materials, or an external customer with a support request, an organization needs to fulfill those requests as efficiently and cost-effectively as possible.

Service catalogs—the electronically available lists of products and services available to all of an organization's or department's customers are replacing paper forms and the myriad informal, one-off requests that bog down a service desk's efficiency. The practice of service management through fulfillment of informal service requests—water cooler mentions of a downed Internet connection or random e-mails requesting a patch that's available online— is rapidly disappearing.

Companies who strive to serve their customers in a timely, cost-effective manner increasingly use service catalogs to manage and fulfill service requests.

Traditionally, a service catalog has been defined as a collection of services offered to a set of clients that enables them to accomplish an objective through the delivery of the service(s). Think of a service catalog as your company's internal version of Amazon.com; on the front end, a Web-based interface enables employees to "shop" for and request needed services (such as a new laptop or access to an enterprise application). On the back end, workflow processes ensure that required fulfillment tasks are completed, and that employees are kept apprised of the status of their requests. Today, just as the help desk has migrated to a service desk, a service catalog should manage business service delivery by receiving requests, automating approval processes, monitoring the status of required fulfillment tasks, and ensuring delivery within the parameters promised to users.

Service Catalogs provide these tangible and intangible benefits:

- Reduced call volumes improve client and departmental efficiency.
- Lower demand on departmental staff reduces routine workload and permits focus on high-value strategic initiatives.
- Automated tracking and documentation fulfills compliance requirements and reduces delivery errors.
- Online forms, knowledge bases, and FAQs provide employees with up-to-date information and reduce paper, printing, and distribution costs.
- Centralized electronic access to forms, procedures, and information contributes to business alignment objectives.
- Access to information enables employees to make informed decisions and enhances job satisfaction.
- Service catalog metrics help pinpoint gaps in processes or documentation, highlighting additional opportunities for operational improvement.
- Service catalogs integrated with existing help desk systems improve accuracy and efficiency, as well as increase ROI for system investments.

The Rationale for Service Catalogs

24x7 self-service is most efficient.
Every department in an organization has its own internal or external client base, and those clients expect their service and support needs to be met in a timely manner. Service catalogs are an excellent tool to improve service delivery by providing clients with a unified service request system.

Progressive companies are also using this method as a retention strategy to enhance employee satisfaction. By providing access 24x7 to policies and benefits and giving employees self-service capabilities, the service catalog improves departmental alignment and streamlines business processes.

Leveraging IT makes it easier to meet business objectives.
IT is using service catalogs to help organizations meet strategic and tactical objectives by proactively defining and marketing services to the business. This role reversal from IT's traditional reactionary posture is the start of a major shift in how IT will be viewed, from a cost center to an efficient, responsive business operation.

Successful service catalogs meet the needs of users who are looking for a simple way to order services instead of a cumbersome, definition-heavy service catalog laden with extra steps. The real value to employees and customers is the ability of the service catalog to *deliver* services, as well as define them. The steps of the delivery process should be transparent: meet user expectations; enable identification of problems; and identify opportunities for improvement.

Tips for Creating and Sustaining Successful Service Catalogs

Keep service catalog projects small, simple, and fast. The six-month (or more) service catalog and related Web development project is fading away. Today, the technology is mature—there's no need to re-invent the wheel to produce a functional and useful service catalog. Off-the-shelf service desk software now provides functionality that once had to be custom developed.

A grandiose, complex approach requires executive sponsorship and all the trappings of a major development project. But by starting small, you can provide real business value quickly. A service catalog doesn't need hundreds of services in place immediately to be useful. Getting a modest service catalog operational quickly will generate support to build the next ten or twenty service items.

To make a service catalog actionable, parse service requests into tasks that can be completed in short time frames. The more complex the process, the more time-consuming the implementation will be. Complexity makes process measurement more difficult as well, limiting the use of metrics for improvement. The result of excessive complexity is frustrated users who abandon the service catalog process, impeding if not precluding service delivery measurement and improvement.

Don't get hung up on service level agreements (SLAs). To facilitate rapid service catalog implementation, avoid SLAs. They are often arbitrary (e.g., 24 hours to restore a file seems "reasonable") and fail to differentiate among users, departments, or request time. In the end, SLAs are often ignored and largely unenforceable.

Instead, use service level expectations (SLEs), which are more accurate because they are based on a real-time history of the time required to fulfill specific types of requests. Users can see how long it has taken to fill similar requests, which creates realistic expectations. Most service catalog software makes it easy to run such reports.

Use measurement tools. Since service catalogs are Web-driven, take advantage of the many analysis tools available that help measure the usability and effectiveness of web-based applications. Service owners can look at trends and spot problems early or target areas for improvement, as well as document and demonstrate these improvements. With data in hand, the IT department can run like a business.

Make service catalogs dynamic and knowledgeable. The most valuable service catalogs identify users by their logins and recommend services relevant to their respective roles and project assignments (just as Amazon.com recommends products to site visitors based on their past buying behavior). For instance, if you're on a specific committee and the service catalog recognizes that agile software development can help you, it should be able to recommend that service.

In addition, service catalogs should provide real-time:

- Request SLEs
- Request status
- Costs
- Reporting for service managers

Avoid pre-built service content. Since every organization has different communications processes, "one-size-fits-all" service definitions rarely fit any company. Yet, because the industry is focused on service definitions and SLAs rather than delivery, many vendors emphasize pre-built service content. Eventually, IT organizations realize that pre-built content—which forces them to modify their processes to fit arbitrary service definitions—has little real value and may even be counterproductive.

Help IT service owners become more business-focused. Service catalogs require IT services owners to understand business issues and communicate with business managers. In addition to honing their business skills, educate IT staff to identify and market services to potential users and train them on different functions in an application.

Embed service catalogs into applications. Make it easy for users to request a service by allowing them to do so while using an application. When users are required to exit the application they need help with, and to search within a separate catalog of services, they are forced to take extra, time-consuming steps in their quest for service. It's feasible to have dozens of different types of contextual service catalogs embedded into specific applications (like SAP), functional areas (like Web services), and/or departmental applications (like HR applications).

Starting small with easily definable and easily deliverable services, and even using a software package that provides the flexibility to easily add services over time, eliminates the need to customize pre-built content.

Service Catalogs in IT and Beyond

Service catalog applications can be used throughout organizations to streamline business processes, as follows:

IT

- Provision an employee desktop
- Request application access
- Request application configuration
- Request application enhancement
- Request new hardware or upgrades

Facilities

- Report office temperature complaints
- Report a broken window
- Request sidewalk shoveling
- Request a security escort
- Schedule a meeting room

HR

- Request benefits (*e.g., vacation and health insurance*)
- Manage benefits (*e.g., health insurance and health/childcare spending accounts*)
- Record status changes
- Request temporary and permanent employees
- Access the employee handbook
- Access benefit enrollment forms
- Access beneficiary forms
- Access pension/retirement files

Financial

- Request a purchase order (PO)
- Request a check
- Check invoice status

Training

- Review training programs
- Reserve training room facilities
- Access a training calendar
- Register for training

Marketing/Sales

- Request literature
- Request a product quote
- Request a sample product
- Request a demo
- Access external product/ service support
- Request a Return Material Authorization (RMA)
- Order a product

Service Catalogs as a Cycle of Improvement

Starting with a definition of business needs that the service catalog will meet and the processes it will streamline, a service catalog should follow a typical improvement cycle: plan, model, manage, and measure. Just as important as the technology that provides the framework (portal) and built-in measurement tools, each service catalog project depends upon the commitment of its sponsors.

Plan
Translate business objectives into measurable services. Once defined, the services close the gap between what business managers need and expect—and what IT delivers. An ongoing dialog between IT and business managers will help IT create useful services and effectively allocate IT resources to maximize business value. As business needs change, services should be adapted and modified accordingly.

Model
Every service catalog should be designed to optimize business value, and this phase identifies resources needed to deliver services at committed service levels. This involves mapping IT assets, processes, and resources back to IT services, then prioritizing and planning resources that support these business-critical services. Business alignment success means that IT is focused on the needs of business managers.

Manage
IT must have processes in place for prioritizing projects, tasks, and support based on predefined rules. To ensure service catalog effectiveness, there should be:

- A method for prioritizing service requests based on business impact;
- A disciplined change management process to facilitate continuous improvement;
- An IT event management system to monitor and manage components that support business-critical services; and
- The tools for measuring and tracking adherence to service level commitments.

Measure
Traditional IT management tools operate in functional silos that confine data collection and operational metrics to specific functional areas. They typically relate more to technology than to business objectives. Without a business context for interpreting metrics, isolated functional groups can't get a holistic view of IT services that support business objectives.

The broader, critical business-focused issues for supporting real-time resource allocation decisions are:

- Are commitments being met?
- Have operations improved in terms of cost, timeliness, and accuracy?
- How are improvements impacting other parts of the organization?

By committing to this improvement cycle and integrating and automating service activities through service catalogs, organizations can align processes to make systematic improvements that meet their business objectives.

***John Sundberg**, founder and president of Kinetic Data, has designed and managed more than 100 information systems for medium and large enterprises. He is president of the Minnesota Chapter of AFSMI (Association for Services Management International).*

Building a CMDB in 5 Steps

by Tim Jarrett

In line with ITIL® best practices, the configuration management database (CMDB) is the central database of IT service management and thus the foundation for high-quality customer service, stable systems and applications, as well as a controlled IT infrastructure. All ITIL processes concerning service support and service delivery, and processes such as IT security management, depend on the configuration management database and can only function seamlessly if the database provides current and accurate data.

There are five steps organizations can follow to help them create an effective CMDB:

Step 1
Define the Objectives

A formalized process, additional tools to implement configuration management, and a supporting CMDB should be introduced in order to deliver specific business benefits. Ideally, there should be reliable information on the current status and performance of the IT organization. From this information and knowledge of the organization, goals can be defined that are desirable, measurable, and achievable. Questions to be addressed include:

1. Which current difficulties, bottlenecks, etc. are the trigger for this project?
2. Which benefits do you expect? Which services will be improved?
3. Who will use the CMDB? What kind of information will the system users search for? What expectations do they have?
4. What are your measurable criteria for success?

Step 2
Assign Responsibilities and Motivate Staff

Change is uncomfortable and results in additional work. Make sure all employees are brought on board from the start, and put together an interdisciplinary team. The team needs to participate in defining goals relevant to the CMDB project and divide the project into phases to deliver demonstrable short-term success.

Be clear about responsibilities. There must be a process owner for configuration management. By clearly assigning responsibility you can help guarantee the success of the project and ensure that the CMDB delivers powerful and accurate information. Someone should also be responsible for the various information sources for the CMDB, to ensure that interfaces are correctly implemented and maintained.

Configuration management has to go hand-in-hand with the establishment of change management and the designation of a change manager. As soon as the CIs (configuration items) are recorded, the maintenance process has to be in place. Otherwise, the accuracy of the CMDB cannot be guaranteed and the investment may be wasted.

A multitude of sources deliver data to the CMDB. This includes information which is redundant, meaning it is not necessary or it duplicates or contradicts other information sources. IT organizations need to define a process that determines the necessary data, how data storage and data updates are handled, and which sources are reliable. Furthermore, objectives must be defined and process responsibilities must be clearly assigned.

Tim Jarrett is the Director of Product Management for iET Solutions. iET Solutions (www.iet-solutions.com) develops, markets, and supports award-winning software applications for the IT service management market.

Employees in the following departments are ideal candidates for the project team:

- Administrator of the IT infrastructure (often described as asset management or inventory management),
- Application management, and
- Staff members from all processes, especially incident, problem, and change management.

Step 3

"Bottom-up" or "Top-down": Select the Right Approach

"Bottom-up" or "top-down"—the best procedure strongly depends on the size of the organization, the number of configuration items, and overall objectives. With a "bottom-up" approach, one has to be careful not to lose sight of the goal. Usually many "local CMDBs" already exist in the form of MS Excel files, MS Access databases, etc. which need to be consolidated. The challenge here is to successfully consolidate the administration of these local CMDBs while meeting the dual objectives of providing sufficient detail for specialist users without the CMDB becoming too large and unwieldy to be an effective tool. Replacing local tactical information sources maintained by individuals can be politically sensitive since it can be construed as a reduction in their responsibilities.

Furthermore, you will be swamped with data, which for the most part is not necessary. When combining information from software distribution solutions and user administration, several thousand relationships can occur in organizations with 1,000 PC workstations and 30 applications, and they will all need to be maintained in the CMDB. The danger exists that you will establish a central database with a vast number of IT assets which will never fulfill the characteristics of a CMDB, such as accurate relationships or restriction to important configuration items.

Therefore, the "top-down" approach is commonly recommended. Instead of recording every configuration item with all configurations, focus should be on the elements that have the greatest impact on the delivery of the IT services. Check your goals: What benefits are expected? Which services will be enhanced?

In reality, a scan of the IT infrastructure will be performed with the help of a discovery solution. The amount of discovered information will be reviewed according to which configuration items are supporting enterprise-critical services and which ones will be recorded in the CMDB. It is not desirable to record every CI with every configuration attribute in minute detail. A frequent successful approach is to start with two or three of the most important services and then gradually expand the CMDB. Often the product catalog of an organization will be used as a guideline for building the CMDB.

Step 4
Defining Content

Within configuration management, the CIs, their relationships, and their relevant attributes are defined. The main question here is, "Which information do we need to successfully deliver our IT services?"

What is a Configuration Item?

According to ITIL, a configuration item is part of the infrastructure that is required for the delivery of systems, applications, and services. The depth of information is virtually unlimited. For instance, a laptop can be recorded as one CI, or each of its components can become a single CI (processor, RAM, network card, drive, etc.). Decisions on the level of granularity and the level of detail at each level of a CI must be made based upon what information the process participants need to deliver the services and comply with existing legal requirements.

Step 5
Fill the CMDB with Data

An organization is unlikely to enter all information manually into the CMDB. This is not manageable considering the complexity of today's IT environments. Moreover, the data would not be complete and accurate at any one point in time. Inventory discovery solutions gather most of the configuration items by scanning the IT infrastructure and delivering the data to initially populate the CMDB and subsequently update the CMDB.

The quality of the CMDB increases if the following is done:

- Determine the "leading systems" from where data will be imported, e.g. user administration, employee personnel data from HR systems.
- Automate data import and synchronization.
- Define the maintenance process and use tools to implement it.
- Reduce the number of interfaces to easily support administration and maintenance.

The CMDB always represents the nominal inventory and also contains regulatory compliance information such as software licenses in use. Therefore, any changes to the CMDB must be made in a controlled fashion, and be authorized and verified by change management. As a result, the database of an inventory discovery solution never represents the CMDB, but only the actual inventory. Variances between nominal and actual inventory should be automatically marked, but a potentially necessary change in the CMDB must be performed manually and in a controlled way.

CMDB: Part of the Bigger Picture

Although we have summarized the process of building a CMDB into five steps, the importance and complexity of developing a CMDB are significant and should not be underestimated. Increasingly stringent regulations, such as the Sarbanes-Oxley Act (SOX), and higher penalties associated with licensing infringements are additional factors that make it more critical than ever to maintain accurate and in-depth information on configuration items. SOX and others appear at first glance to focus on accounting and auditing, but data management in general and financial reporting in particular, is almost completely reliant on the performance of the IT infrastructure, such as networks, software, servers, and desktops. The CMDB offers significant improvements to the processes of managing authorizations and providing an audit trail to track changes. Putting in the effort upfront to set up your CMDB effectively will be beneficial to your organization in the long-term.

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- 101 Taking Charge of Your Development
- 201 Integrating Service Catalog, Business Plan, Budget and Rates Into Your Planning
- 301 The Agile IT Organization: Designing an IT Organization that Keeps Pace with Your Business
- 401 Understanding the Business Value of IT
- 501 Into the Looking Glass: IT Costs
- 601 Executive Perspectives on Business Value from IT
- 701 Improving IT & Business Alignment
- 801 Delivering IT Services That Are "Like Air"
- 901 Achieving a Business-driven Approach to IT Strategy and Requirements Planning

IT Business Alignment & Governance

IT strategies and goals must be consistent with the overall business objectives of the organization. By definition, IT/business alignment requires establishing a governance process to improve relationships and ensure a common understanding of priorities and service levels. Learn best practices and methodologies to better align your IT organization with the strategic goals of the business and improve IT processes to ensure compliance with SOX, CobiT, ISO and other framework and regulatory requirements.

- 102 Strategic Architecture: Stepping Stone to Aligning IT & Business
- 202 Communication for IT Professionals: Creating a Shared Meaning
- 302 IT Project Portfolio Management: From Squeaky Wheels to Productive Conflict
- 402 Compliance, Value, and Governance: From the "Three Amigos to the Three Musketeers"
- 502 Enterprise Architecture as Glue: The Well-managed IT Organization
- 602 A Practical Look at IT Business Alignment
- 802 Using Change Management to Reduce Costs, Improve Service & Ensure Compliance

Security, Storage, Compliance and Business Continuity

Data security and effective data storage management are among the most important and challenging issues facing IT leaders today. Business continuity covers all key aspects of the business and IT services that must be continued in case of a service disruption in order for the business to survive and thrive. This track will feature case studies, industry best practices and proven methods for implementing cost-effective formal processes and strategies for optimal data storage, business continuity/recovery and information security that complies with SOX and other regulatory mandates facing IT and the business.

- 103 IT Security Master Planning at Los Angeles World Airports
- 203 Policing the Enterprise: Security Management Best Practices
- 303 Protect Your Data Using Aggregation & Centralized Storage
- 403 The 12 Common Mistakes That Undermine BIAs
- 503 If Compliance Is So Critical, Why Are We Still Failing Audits?
- 603 The Latest Techniques for Strategic Data Protection
- 703 Conducting the Optimal Tabletop Exercise
- 903 New Regulations & Compliance Issues: How to Stay One Step Ahead

IT Service Management

IT organizations are increasingly adopting service management disciplines, frameworks and best practice processes to improve performance, reduce costs and compete with external sourcing alternatives. This track will focus on practical processes, case studies and foundational components of the ITSM lifecycle that must be in place to maximize and support the overall success of IT.

- 104 Time to Take the IT Out of ITIM, ITSMF & ITIL®?
- 204 Understanding How IT Controls Impact IT Performance
- 404 Why Can't We All Just Get Along?
- 504 The IT Service Catalog: Opening New Customer Channels While Driving Service Improvements
- 604 Improving Compliance with Strategic Service-level Management
- 704 Taking the Puzzle Out of Integrating the Infrastructure
- 803 Transforming IT into a Strategic Powerhouse
- 804 Can Root Cause Analysis Increase the Bottom Line?
- 805 Translating ITIL® Theories into Operational and Development Practices
- 904 The Road to Knowledge Ownership: A KCS Case Study on HP

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105 Plug & Play Solutions: Sourcing Strategies for Today's Organizations
305 A Case Study on Outsourcing Service Management
405 Strategic Evolution: A Global Survey on Sourcing Today
605 Check, Checkmate: The Game of Strategic Sourcing
905 Evaluating Outsourcing? Tips to Ensure BPO Success

ITIL® Implementation

ITIL® is not a step-by-step methodology, but rather provides a comprehensive framework of reality-based practices for continuously improving the integrated IT service support and delivery model. This track will focus on the "how to" of ITIL® implementation by reviewing the successes, failures and learnings of ITIL®-experienced organizations. An overview of all relevant IT and business frameworks and continuous improvement methodologies (e.g., Six Sigma, CobiT, ISO, CMM, etc.) with practical lessons will be provided to help you decide which components would work best together based on your IT and business needs and requirements.

106 A Practitioner's 'Visible Ops™' Benchmark Case Study
206 Mining the Value of ITIL® Version 3 Without Losing Program Momentum
306 Value Driven Problem Management: Effective Diagnosis & Root Cause Analysis
406 Change & Release: What's Really Driving Improved Performance?
506 Drawing the Line Between Projects: Change & Release Management
706 Case Study: Mapping the Problem Management Processes
806 Globalization ITIL®: Strategies for Addressing Cultural Differences

Technology Trends

This track focuses on the business relevance and cost-benefits of selecting, implementing and maintaining the IT infrastructure, applications and services delivered to the business. Find out what new emerging technologies can improve the way you do business, resulting in operational cost savings and improved efficiency, while ultimately maximizing the overall profitability of the business. And, learn how to effectively manage a technology rollout to minimize business disruption and improve end-user productivity.

205 Innovation Powered by Customer Centricity & Collaboration
304 The Future of Mobility & Wireless Computing
505 VoIP – The Good, the Bad & the Opportunity!
606 Planning a Successful Vista Enterprise Rollout
705 Trend Makers for the Support Industry
902 The IT Management Software Players & Best Practices for Success

Technical Support Psychology—DEALING with STRESS

CUSTOMER SERVICE

— *by Robert Verstandig* —

Good people skills are essential.
Each job has its own level of stress, some more so than others. Providing technical support in the IT industry in particular can be extremely difficult because, as well as dealing with sometimes incredibly complex equipment, the analyst onsite must also try to pacify an irate CEO or business executive.

Don't get overwhelmed by the situation.
In most companies, time is money and there could be anywhere between two and two thousand people waiting for you to fix the problem. When faced with this kind of pressure it's very easy to be overwhelmed by the situation and go into a 'panic mode,' trying various things at random, without any kind of definite plan. I have found that the best approach to this is to take a mental step back, then a few deep breaths to try and calm your mind. It's going to be a tough day but it's only a few hours of your life so there's absolutely no point in getting too stressed out about it.

Do not confuse relaxing with not caring.
You still have a problem to solve with professionalism and expediency. Once you have control of yourself then you are ready to take care of your customer.

Go back over the facts and try to think 'outside the box.'
It's possible the solution to your problem is sitting right in front of you but you are simply too close to see it.

Try to get a second opinion if possible.
Sometimes a fresh pair of eyes on a problem is all it takes to resolve it. If this isn't possible then perhaps a sounding board will help—just someone to bounce ideas off of to help get your mind back on track. They don't have to be technical or understand what you are talking about. In fact, you can even talk to yourself (although I don't recommend this especially if there are other people around). The main aim here is to get the situation completely clear in your head.

De-stress your client.
It's quite common to receive a call for help some time after a problem has occurred (sometimes even months may have elapsed). Perhaps the customer thought they could fix the problem themselves or maybe they thought the problem would just go away. Anyway, it hasn't, the customer is in a panic, and now it's YOUR job to fix it. When faced with this situation, your first priority is to calm down your client. Have no doubt that they'll be all over you. Remember, they could be losing thousands of dollars an hour so make sure you respond appropriately. They will be stressed. If they want to know what you are doing, tell them.

Always speak to your clients at their technical level.
If your client is a technician then talk technical, if not, then drop the 'jargon' as much as possible. It's very easy to fall into the habit of using technical jargon and acronyms that are completely obvious to people in the industry but mean absolutely nothing to your client. If they can't understand you, they'll just get more stressed.

De-stress yourself.
In order for you to fault find effectively you'll require a degree of peace and quiet to be able to think clearly. If your client is panicking or there's too much going on around you try using the following strategies:

- **Reassure your client that their problem can and will be fixed as quickly as possible.**
- **Speak calmly and firmly so they know you are in control of the situation.**
- **LISTEN to what they have to say. This will also have a calming effect on them and show them you care.**
- **Try to organize one point of contact so you're not constantly disturbed by various people checking in to see how the repair is going.**

Once you have your customer under control you'll be able to get more useful information from them regarding the problem.

The whole point here is to try to create an environment which is as stress-free as possible.

Robert Verstandig *is a Senior Systems Engineer currently under contract with Curtin University in Perth, Western Australia. He has over twenty-five years of experience in the Avionics and IT industry and has supported a wide variety of technology. Robert is also the author of the book,* **Secrets of Troubleshooting Systems***, which describes the ins and outs of fault diagnosis in complex systems.*

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Calculating Help Desk Staff Requirements

Sharpen your pencils. Dust off the calculator. It's time for a math lesson.

by ***Penny Reynolds***

Running a successful help desk operation means managing by the numbers. And the most important number of all is the number of bodies in seats each hour to respond to incoming calls. Since over two-thirds of operating costs are related to personnel, getting the "just right" number of staff in place is critical in terms of both service and cost. This article outlines the step-by-step process to calculate help desk resource requirements and evaluate the most important service and cost tradeoffs.

Calculating Workload

In the previous article on *Forecasting Fundamentals*, we explained the process of forecasting calls—taking historical data and analyzing trends and seasonal patterns to arrive at monthly estimates, then using day-of-week and time-of-day patterns to break down the numbers into hourly or half-hourly forecasts.

With these call volume forecasts and some assumptions about average handle time (AHT), you're ready to perform a simple calculation to arrive at staff workload. It's simply the number of forecast calls for an hour multiplied by the average handle time of a call. The average handle time (AHT) is made up of two components: actual conversation or talk time plus any after call wrap-up time associated with the call. The wrap-up time can include almost anything—filling out a form, updating the customer database, etc.

This handle time will likely vary by time-of-day as well as by day-of-week. For example, you may find that AHT is higher during the evening shift since you may have newer staff working the undesirable hours, or simply have callers that like to talk a little longer during the wee hours of the morning. Most support centers simply use an average number for handle time across the board, which may be a dangerous assumption if there's significant variance. Imprecise numbers can contribute to understaffing or overstaffing, so it's best to use numbers that actually reflect time-of-day or day-of-week patterns.

The workload number is then used to determine how many base staff are needed to handle the calls. The part that makes staffing for a help desk different than any other kind of staffing situation is that this workload doesn't represent typical work patterns. Let's compare an incoming call handling group to a group of clerical workers processing mail in the same company. Between 8:00 and 9:00 A.M., the clerical staff has 400 pieces of mail to process and each piece takes three minutes to handle. That's 1,200 minutes or 20 hours of workload. How many people need to be working to accomplish all the work in an hour?

Ok, this isn't the tough math part yet. To process 20 hours of workload, 20 staff would be needed. The reason for the 1:1 ratio is that the mail tasks represent sequential workload. In other words, the staff can process the work as back-to-back tasks and each person can accomplish one hour of work in an hour timeframe.

Determining Help Desk Staff Requirements

Now it's time to staff for the help desk. These employees are getting 200 calls and each one takes an average of six minutes to handle—five minutes of conversation and another minute of after-call work. Again, we have 1,200 minutes or 20 hours of workload. How many people are needed?

Unfortunately, we can't handle the calls with only 20 people. At 8:05, there may be 22 calls arriving, meaning all 20 agents are busy, with another two calls in queue. Then at 8:15, there may only be 16 calls in progress, meaning four of our staff are idle. Those four people won't be able to accomplish a full hour's work, simply because of the way the calls have arrived. In an incoming call center or help desk, the work doesn't arrive in a back-to-back fashion. Rather, the work arrives whenever our customers decide to place calls. So we have random workload instead of sequential work. This brings us to the first math rule of help desk staffing: ***You must have more staff hours in place than hours of actual work to do.***

So, how many extra do you need? For 20 hours of workload, will you need 21 staff? 24? 30? The number of staff needed depends on the level of service you wish to deliver. Obviously, the more staff you have, the shorter the delay. The fewer the staff, the longer the caller will wait.

Determining what happens with a given number of resources in place to accomplish a defined amount of workload requires a mathematical model that replicates the situation at hand. There are several telephone traffic engineering models available and one of these in particular is well-suited to the world of incoming call centers and help desks. A model called Erlang C takes into account the randomness of the arriving workload as well as the queuing behavior (holding for the first available rep) of the calls.

An Example of Erlang C

Let's take a look at Erlang C predictions based on the 20 hours of workload we defined earlier. The table on the following page shows what would happen when anywhere from 21 to 28 staff (column one) where in place to handle the 20 hours of incoming call workload.

Let's take a look at each of the columns and measures of service. The second column shows the portion of calls that would find no agent available and go into queue and the third column shows how long those delayed callers would wait on average. So, with 24 staff in place, the

Number of Staff	Delayed Portion	Delay of Delayed Callers	Average Delay (ASA)	Service Level (in 20 sec)
21	76 %	180 sec	137 sec	32%
22	57%	90 sec	51 sec	55%
23	42%	60 sec	25 sec	70%
24	30%	45 sec	13 sec	81%
25	21%	36 sec	8 sec	88%
26	14%	30 sec	4 sec	93%
27	9%	26 sec	2 sec	96%
28	6%	23 sec	1 sec	97%

Example of Erlang C

Erlang C model predicts that 30 percent of callers would be delayed and that they would wait an average of 45 seconds in queue.

The third column represents the average delay of *all* calls, including the ones that are answered immediately. So, with 24 staff in place, 30 percent of calls would go to the queue and wait there 45 seconds, while the other 70 percent would be answered immediately. The average delay, or average speed of answer (ASA) is the weighted average of both these groups [(45 x .30) + (0 x .70)] = 13 seconds. It's important to understand that this ASA number is not the average queue experience for the callers. Either they wait (and do so for an average of 45 seconds), or they don't wait at all. The ASA isn't a "real life" number—it's a statistic to represent the average of the two other numbers.

The fourth column represents service level. Service level represents X percent of callers that are handled in a specified Y seconds of delay time. This table shows the percentage that are handled within a specified 20 seconds of wait time. A common service goal is 80 percent of the calls handled in 20 seconds or less. To meet this goal, you would need 24 staff in place, yielding a service level of 81 percent in 20 seconds.

Staffing to Service Goals

So what should your service goal be? While there are some common goals seen often in help desks, there's really no such thing as an "industry standard" for what a service goal should be. Setting a speed of answer goal depends upon many different factors. Help desks need to consider enterprise goals and marketing strategies, competitor standards, and most importantly the expectations of callers. We often find that help desk management marches toward the same service goal year after year without ever considering if the goal should be higher or lower based on the business environment or customer demands.

Customer expectations have certainly risen when it comes to speed of answer expectations. More and more callers are basing their expectations and judging your service on their last, best service experience. Taking a look at your ACD reports and looking at when callers begin to abandon calls will give you some idea about a "worst case" delay scenario. But setting the "best case" goal should involve getting feedback from senior management, customers, competitors, and other call centers and help desks—and then evaluating cost and service trade-offs to determine the impact on cost and on service of raising or lowering the goal.

Relationship of Staffing and Service

Let's take one more look at our staffing table and review the impact on service as staff numbers change. Obviously, delay times increase as agents are subtracted, and service improves as staff are added. But service is not affected to the same degree each way, and this is a terribly important phenomenon to understand about support center staffing.

Let's say you've decided you need to have 24 staff in place to handle the 20 hours of telephone workload in order to meet an 80 percent in 20 seconds service level goal. If you adjust the staff numbers up or down, there are two very different impacts. First, if you add a person or two, the average speed of answer (ASA) improves from 13 seconds to 8 seconds with 25 staff, and then to 4 seconds with 26 staff. The first person added yielded a 5-second improvement, with the next person gaining us only a 4-second improvement, and a third person would result in an ASA of 2 seconds, a 2-second improvement. Adding staff results in diminishing returns, with less and less impact as the staff numbers get higher.

Now, let's look at the effect of subtracting staff from our 24 person requirement. When you subtract one, two, and three persons the ASA increases to 25 seconds, 51 seconds, and 137 seconds respectively. The first person out resulted in an increase of 12 seconds, the second in another 26-second decline, and the third in a jump of another 86 seconds! By taking staff away, service worsens and it does so dramatically at some point. There are especially big jumps as the staff number gets closer and closer to the hours of workload.

You can view this as both good news and bad news. The good news is that if you're delivering poor service in your help desk, you can improve it dramatically by adding just one more person. On the other hand, when service levels are mediocre to bad, one more person dropping out can send service into such a downhill slide that it's nearly impossible to recover.

Calculating Shrinkage and Schedule Requirements

The numbers we've discussed so far are purely "bodies in chairs" numbers. These numbers assume that all agents are always available to handle call workload.

However, we all know that agents aren't available much of the time. You have to factor in this unavailability into the schedule requirements so you end up with enough staff to man the phones.

In calculating staff requirements, a final adjustment needs to be made to factor in all the activities and situations that make staff "unproductive." We refer to this unproductive time as staff shrinkage and define it as any time for which staff are being paid but not available to handle calls. You will want to include such activities as breaks, meetings, training sessions, off-phone work, and general unproductive or "where the heck are they?" time.

In most help desks, staff shrinkage ranges from 20-35 percent. We account for this shrinkage factor in our staff requirement by dividing the Erlang staff requirement by the productive staff percentage (or one minus the shrinkage percentage). In our example, if 24 staff are needed and our shrinkage factor is 30 percent, then 24.7 yields a requirement of 34 schedules.

Next Steps

In the next article in this series, I'll help you understand a few more of the numbers associated with help desk staffing including the effect of arrival rate, calculations of staff occupancy, and impact of size on help desk efficiencies. I'll also discuss how workload calculations and staffing models are different when planning resources for handling other channels of communications such as outbound calls or e-mails.

NOTE: This article is an excerpt from the *Calculating Staff* chapter of the book *Call Center Staffing – The Complete, Practical Guide to Workforce Management*. To learn more about this and other books from The Call Center School, visit: **http://www.thecallcenterschool.com/bookstore/index.html**.

Penny Reynolds *is a Founding Partner of* ***The Call Center School****, a Nashville, Tennessee based consulting and education company. The company provides a wide range of educational offerings for help desk and call center professionals, including traditional classroom courses, web-based seminars, and self-paced e-learning programs at the manager, supervisor, and frontline staff level. For more information, see* ***www.thecallcenterschool.com*** *or call 615-812-8400.*

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Dear Dr. Jim,

A colleague of mine that works for another company told me that she recently attended an ITIL® training course that you were teaching. She mentioned something to me about an idea you shared regarding what you referred to as "SPOD," which she said means "single point of data." It sounded interesting and important, but I don't think she did justice to the explanation. She said it referred to something about the functions or activities that are performed by the service desk.

I want my service desk to adopt as many "best practices" as possible, but I must admit that I am not familiar with this concept, at least the way it was described by my colleague. It all sounds so mysterious. Can you enlighten me a little about "SPOD" and why I might need it at my service desk?

—Mysterious in Milwaukee

Dear Mysterious,

Actually, there should be no mystery, and let me explain why. Part of my "regular job" is teaching public courses and courses within companies about practices described in the Information Technology Infrastructure Library® (ITIL). ITIL is the de facto standard worldwide for managing the many aspects of IT organizations for more efficient and effective operation. If you haven't been exposed to ITIL yet, it would be worthwhile to investigate further.

"SPOD" does means "single point of data," so your colleague was right about that part. It is also not an "official" ITIL term but a term that I use to describe an ITIL concept. But let's start at the beginning.

I think the best way to introduce the SPOD concept is to describe the activities or "functions" of a service desk according to ITIL. Some of the functions are as follows:

Receiving calls, first-line end-user liaison
The service desk should play the role of advocate for the business and the liaison between the business and IT. The service desk should be the single point of contact (SPOC). You should be the one and only place the business contacts for everything they need from IT, not just the place they call for reporting incidents.

Recording and tracking of outages and requests
This is where the "single point of data" (SPOD) concept is introduced. Recording ***every*** transaction in the IT service management (ITSM) tool is vital; otherwise it becomes extremely difficult for effective trending analysis to take place on a database. Other ITIL processes such as problem management and availability management rely on the database to gather data that helps eliminate problems and increase availability of services (uptime). Other service desk functions will also be less effective unless SPOD is in place (see other references to SPOD on the following page).

Making an initial assessment of incidents, attempting to resolve them or refer them to someone who can, based on agreed service levels
One of the primary goals of the service desk is to rapidly restore normal service. So a quick assessment and quick steps to resolve issues is important. If the service desk is unable to

quickly resolve an issue, an escalation model must be in place based on service level agreements (SLAs) with the business, operational level agreements (OLAs) with the various IT support groups, and underpinning contracts (UCs) with third party vendors.

Monitoring escalations and escalation procedures relative to the appropriate service levels
Once an issue is escalated, the service desk will monitor the escalation to be sure that each issue is being handled in an appropriate timeframe based on the SLAs and OLAs in place as well as the UCs with any third party vendors who handle escalations.

Managing the incident lifecycle including closure and verification and managing the request lifecycle including closure and verification
Another key concept is that the service desk will maintain ownership of all incidents and requests throughout their entire lifecycle. Even issues that are escalated are still under the "ownership" of the service desk. In fact, second and third level support staff may put any resolved issue into a "resolved" status in your ITSM tool, but the service desk is accountable and responsible for closing any records once resolution has been verified with the user. This communication step is important whenever any issue has been escalated. It gives IT a chance to make sure the user is satisfied before any record is closed. It shows the business that IT is serious about the quality of the work they do for the business. It also means that issues will not likely be forgotten or delayed since the service desk will be monitoring all resolutions.

Another role played here is to ensure that all parties that have worked on an incident or request have properly documented their actions for future reference. This allows us to "recycle" resolutions and use them again where they may apply. But without proper documentation this becomes problematic. This is another aspect of the SPOD concept.

Contributing to the identification of recurring incidents or requests
Through trending analysis, the service desk can identify opportunities to reduce or eliminate recurring incidents or requests. This may require the involvement of problem management. This is one of the functions that will be very difficult if the service desk does not practice the concept of SPOD. Trending analysis only works with sufficient and complete data being gathered in the ITSM tool.

Communicating planned and short-term changes of service levels to the business
In ITIL it is essential that the service desk staff demonstrate highly developed interpersonal skills as one of their vital skill sets. This makes them ideal candidates to be the "professional communicators" from IT. Therefore, it makes sense for them to communicate information to the business about any planned changes to the IT infrastructure through change management. The business needs to be informed so they can take appropriate actions to complete important work that might be affected by changes.

Hence, it is a good practice to include someone from the service desk to be a part of the change advisory board (CAB), enabling them to be well-informed about any approved changes.

Coordinating second and third level and third party support groups
Since the service desk is monitoring escalations they will be able to coordinate second and third level and third party vendor activities. This helps to ensure that issues are being handled according to agreements in place. They can keep all support groups informed about the actions of other groups that are working toward resolution of any issue that has been escalated.

Highlighting end-user training and education needs
Trending analysis also allows the service desk to notice whenever a business unit may need some additional training based on frequency of incidents or requests about specific services. Then they can make sure the proper training is provided to the business. But this is only possible if the service desk is the SPOC and all transactions are properly recorded in the ITSM tool which is the SPOD.

Providing management information and recommendations for service improvements
By recording and tracking all incidents and request management information, reports can be generated for the business which allows the business to make informed decisions about IT services. The trending will also allow meaningful recommendations for service improvements to be made. Another area where SPOD comes into play.

Providing an interface to other service management processes such as configuration management, problem management, change management, and service level management
The service desk will naturally be the most informed group in IT through the nature of their activities (SPOC and SPOD) giving it the ability to interface with other service management processes and providing them with information and recommendations that will help improve service to the business.

So, based on the activities described here, I think you can readily see why I emphasized the single point of data (SPOD) concept in the course your colleague attended. There really is value to capturing all the data about every incident and request, even just for trending analysis alone.

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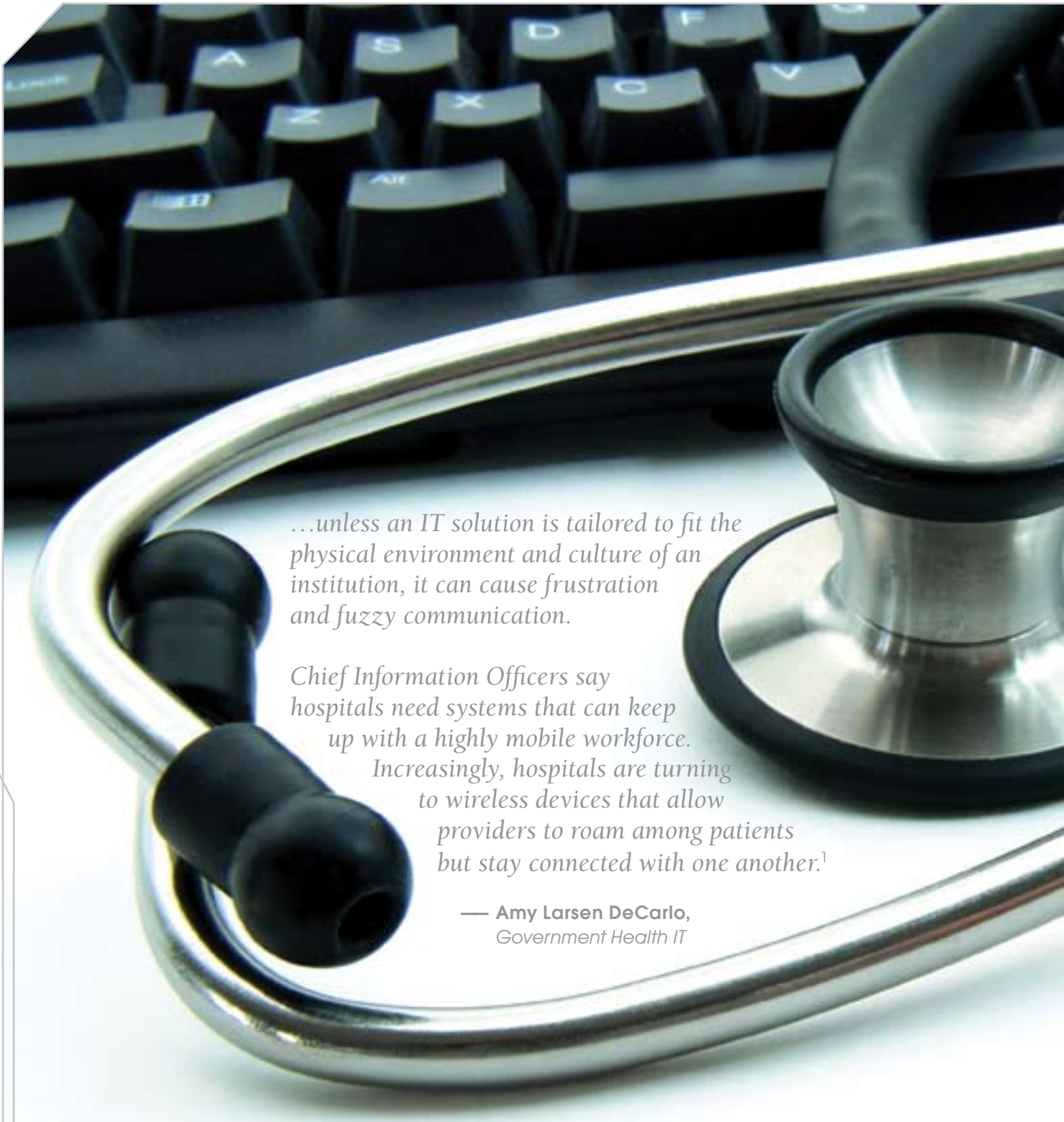

…unless an IT solution is tailored to fit the physical environment and culture of an institution, it can cause frustration and fuzzy communication.

Chief Information Officers say hospitals need systems that can keep up with a highly mobile workforce. Increasingly, hospitals are turning to wireless devices that allow providers to roam among patients but stay connected with one another.[1]

— **Amy Larsen DeCarlo,**
Government Health IT

by **Robert Last**

"BUT Johns Hopkins Has It..."

Preparing to Support New Medical Technology

One of the few constants in healthcare IT and healthcare IT technical support is that the pace of change is exciting, saves lives and money, and will be a constant and disruptive force for the foreseeable future. Whether a hospital is using a Motion Computing Motion C5—a bar coding system that helps eliminate errors in bedside medication delivery—or an Avaya Labs Mobile Access to Converged Communications Systems (MACCS)—MACCS use hands-free headsets and an intelligent voice agent to locate and connect staff members who are in different locations within a hospital—fallible human beings and fallible technology will interact hundreds and thousands of times per day. Such interactions are the heart and soul of technical support work in the healthcare environment.

Each of these interactions carries the possibility of success, failure, questions, mechanical breakdown, user error, and user exploration of the technology. Despite the best efforts of the vendor's project management staff and the hospital's CIO, someone is going to call someone with a question, a complaint, a problem, or a request and that call will most likely, one hopes, go to one support center where it will be handled by a qualified support center analyst that has at their disposal the tools, the knowledge base, and the skills necessary to satisfy the user. Of course, all of this must happen as quickly as possible, as inexpensively as possible, and be done only once. A patient's life may, literally, be at stake, as well as the career of a medical technician, a nurse, a doctor, and the reputation of a hospital. No pressure on the support center in this scenario is there?

DON'T GUESS, KNOW

The best organizations will purchase, implement, install, and support all of their medical IT tools based on plans that are prepared in advance and the result of commonsense, good judgment, experience, and best practices. Simply put, don't create your support plans, policies, and procedures as your users are calling. Do your planning and training in advance of the implementation and prepare for the worst while hoping for the best.

Many support managers will say, "It's not possible to anticipate the problems that a new piece of technology will generate." True, but only to a limited degree. While a support center manager won't be able to anticipate all of the problems and challenges involved in supporting new equipment, it is possible to make some reasoned judgments and predictions about how a new IT system will be received by building a Support Center-Technology Support Plan (SC-TSP).[2] The outline for a Support Center-Technology Support Plan is shown below.

SUPPORT CENTER-TECHNOLOGY SUPPORT PLAN

Introduction

This outline, The Support Center-Technology Support Plan (SC-TSP) can be used to generate a detailed, well-documented plan that describes how a product, software release, or service will be supported. It is meant to be a "living" document that is created *before the product, application, or service is set to "go live"* and should be updated as necessary. The plan is typically written by the support center manager in cooperation with members of Development, Sales, IT management, the customer/user, and other interested parties. It is not meant to be and should not be used as a replacement for the tools and techniques found in service level management.

Administrative

Product/Service/Application to be Supported:

Date SC-TSP was Prepared:

Date Support will Begin:

Target Audience:

Describe who reviews and uses the information in the plan. The audience should include the support center staff and any other constituent group that has an interest in or will be impacted by the implementation. Include any third parties involved in selling or supporting the product or service, including OEMs. Indicate how the third parties will interact with the support center.

Product/Release Description

Describe the product/service/application in terms that could be understood by a non-technical person. (A good source of information is usually market literature.) When this description has been completed, then go into technical detail as necessary. Lean on the side of caution and assume that the product/release/service will not be flawless. Look for bugs, problems, and questions relating to the implementation that no one wants to think about.

At least one support analyst, usually a senior one, should be assigned as the *de facto* expert on the product/release/service.

Customer/User Environment and Use of the Product/Service

Describe the typical customer and how they will use the product/service/application. Try to answer the following:

- Is this a critical product/service/application?
- If it does not work or has problems working, what will be the impact?

- What additional training will users and support staff require?
- Who will develop the training plans?
- Who will deliver the training?
- Is the person delivering the training a professional trainer?
- Will assistance from product experts be required? If so, describe what kind of assistance.
- What support model will be used for this product/service/application?
- Will the service management system (SMS) require new fields for entering ticket information?
- When will the knowledge base system (KBS) be updated?
- How will the KBS be updated?
- Who will update the KBS?
- Will the telecommunication and e-support system be able to handle the increased load?
- What reports will be generated relating to the implementation? What audiences will receive these reports?
- How will the implementation impact support center staffing? See 'Workload Forecast.'

List of Personnel

List the names, schedules, and responsibilities of all personnel involved in or directly responsible for supporting this product/service/application, their skill-sets, and training needs.

Workload Forecast

The workload forecast is based upon the calculations derived from an analysis of anticipated problems, the size of the customer/user base, and the desired support center level of service. The description of the level of service should be statistical (support volume, service levels, response statistics, resolution statistics, and breakdown of problem category analysis) and not antidotal. The workload forecast should have multiple versions and reflect different scenarios; do not assume that the implementation will be flawless.

Call Flow and Escalation Process

In narrative and graphic form, document and identify the model call flows that the support center staff will follow. Identify or establish service level agreements (SLA), operational level agreements (OLA), and underpinning contracts (UC) and test them in multiple tabletop exercises to ensure that they are valid. Completing the documentation does not guarantee that they will work as intended, but tabletop exercises are an excellent way to test the strength and flexibility

Standard Operating Procedures

Document detailed procedures for handling customer/user requests, problem reporting, angry customers, service level breaches, etc. One size does not fit all and new implementations are almost always recipients of the Law of Unintended Consequences.[3] As with the service level management elements discussed above, use tabletop exercises to identify and test the SOPs that will enable the support center to identify potential problems in advance.

Quality Improvement Plan

Quality improvement plans are not an optional activity; they are necessary to identify any activity, procedure, policy, etc. that can be improved based on the collective experiences of the support center staff. Lessons learned have to be sought, identified, and integrated into daily operations to benefit both the customer/user and the support center staff.

Implementation Project Plan

With the motto, "If it is important to our customer/user, it is important to us," in mind, it is critical that the entire implementation be executed according to a documented project plan and using recognized project management practices. Information technology professionals are famous (perhaps infamous would be a better word) for underestimating the complexity of implementations. The best example of this assertion is the United States Government's Federal Aviation Administration that has been trying, unsuccessfully; to upgrade the air traffic control system since the early 1980s and has failed to do so as the waits at O'Hare airport this summer indicate.

CONCLUSION

No plan is foolproof, but by engaging in the process of creating a SC-TSP, it is possible to prepare a support center to support a new product, application, or service. A successful implementation will allow you to begin supporting a new product/service/application by taking advantage of the "80/20 rule." By developing a good SC-TSP, you will be able to identify and react successfully to the top five to ten questions and problems that will be encountered which usually constitutes 80 percent of the problems encountered when the implementation "goes live." When it comes to supporting new implementations this is a good starting point that can be easily built upon as the support center staff gain more experience with the new products/applications and services.

1 "Healthcare Unplugged," *Government Health IT*, July 2007, p. 37.

2 The concept for the SC-TSP has been circulating among support consultants for over a decade and can be found in many different forms. For example, it can be seen in the work of Char LaBounty (LaBounty & Associates, Inc.) in the area of Service Level Management and Rod Dahl (Virsten TeleCorp) in the Customer Support Plan Outline. The original version of the "Support Plan Outline" was created by the author and Rod Dahl in 1998 while consultants for San Diego-based Service Strategies Corporation.

3 "The Law of Unintended Consequences, often cited but rarely defined, is that actions of people…always have effects that are unanticipated or 'unintended.'" URL: http://www.econlib.org/library/Enc/UnintendedConsequences.html Retrieved on August 8, 2007.

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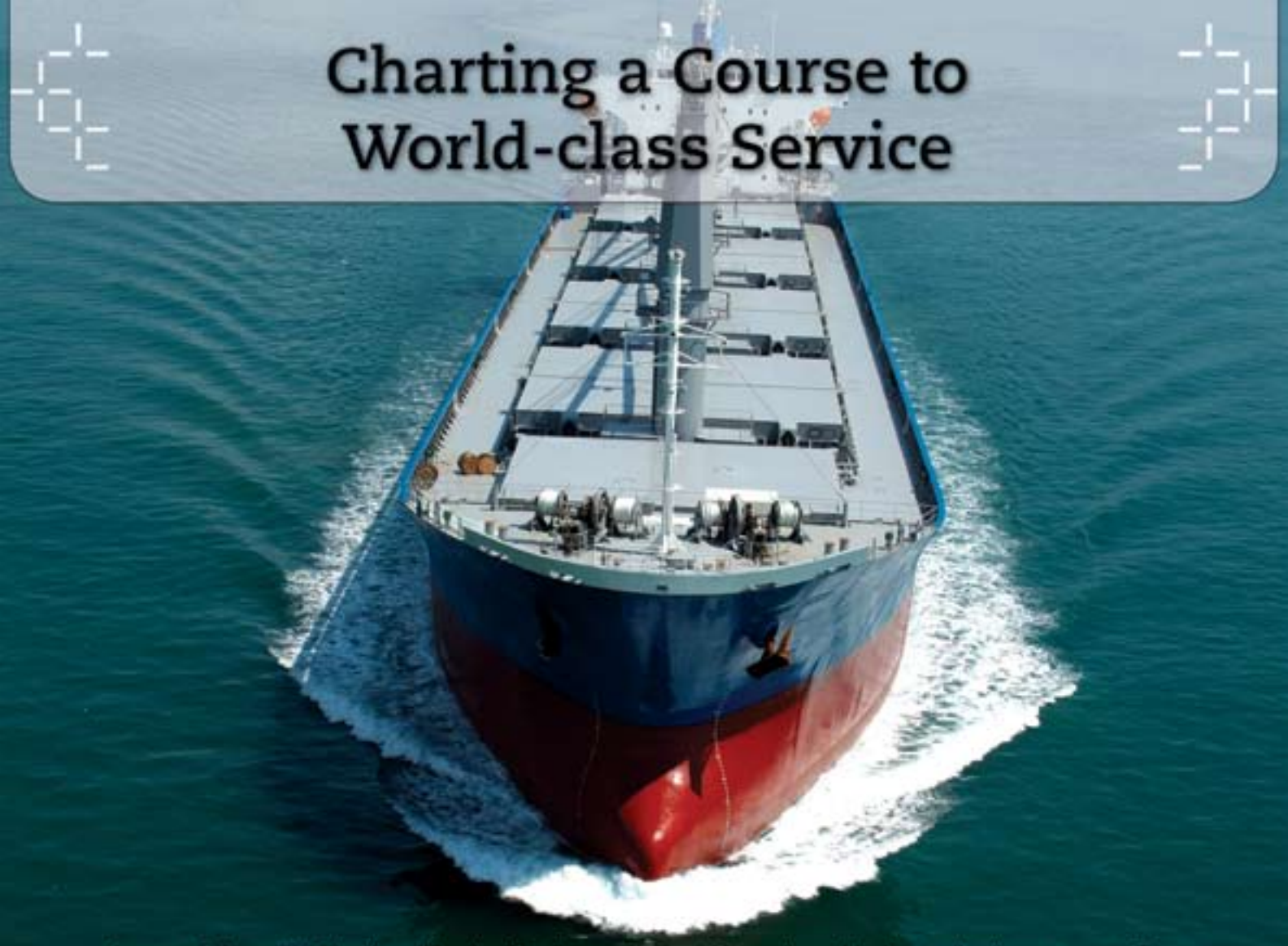
Charting a Course to World-class Service



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CMDB FUNDAMENTAL *to IT Service Management*

With such a complex and dynamic function, technology plays an important role in the deployment, management, and upkeep of a CMDB. Why should you implement a CMDB and what can CMDB technology do for you?

Robert McNeill, VP Strategy, *Service-now.com*

IT organizations are beginning to clearly define what it is they are providing to the business and secondly, understand the complex set relationships and dependencies that support service availability and performance. A number of applications enable this effort, including service catalogs that not only define the services and build expectations with the customer but automate the workflows for provisioning services to IT and the business.

The CMDB is at the heart of this effort—the single point of truth that houses the intelligence on the state of IT services. The CMDB contains all relevant details of each configuration item (CI) and details of the important relationships between configuration items, the organization, and services. It provides accurate information on configurations (CI relationships with people and groups) and their documentation to support incident management, problem management, change management, and release management.

Accurate data from your environment is required to fuel the CMDB. Discovery technologies must be used to not only discover assets but correlate those relationships and dependencies to services. By abstracting an application to a business service, the use of application dependency discovery/mapping and visualization technologies can help translate a heterogeneous and complex infrastructure to business services. With this information, IT now knows the state of any incident, problem, change, or release as it affects the business service. The CMDB, as a result, becomes the single system-of-record for IT which will be utilized to upgrade, repair, track, and manage the business services supported, and the infrastructure which underlies them.

Scott Walling, Managing Consultant, *Monitor 24-7 Inc.*

The CMDB must be dynamic enough to not only model physical, hard connections between assets, but logical connections as well. In addition, it must provide the ability to create logical assets (these are usually the most important) such as line of business applications, application clusters, Web clusters, services, etc. Having the ability to model the current environment in not only a physical but also a logical view provides a true window into the operational aspects of the infrastructure. To support CMDB modeling, the technology must provide both a very simple, graphical, and automated way of defining

Configuration management and a CMDB (configuration management database) help manage the assets and services within an organization as well as provide critical information on their relationships and configurations within the IT infrastructure. With the right strategy and technology, the CMDB can yield up-to-the-minute information, analysis, and models, aiding in the support, monitoring, and management of the IT infrastructure and the services it supports.

complex logical and physical configuration items (CIs) and their relationships. The physical and logical models may change frequently; if the models cannot be easily updated, then its value within the ITIL® framework and to the organization quickly diminishes.

Once the infrastructure is modeled and stored in the CMDB it must provide the ability to quickly identify potential upstream/downstream issues through topological impact analysis—this is probably the most understated, but yet, most useful aspect of the CMDB when correctly configured. Now add on the ability to easily integrate these infrastructure and business models into infrastructure monitoring and management systems and you have up-to-the-minute service outages and impact analysis all at the fingertips of the service desk. This alerting through CMDB models now enables the service desk to quickly and concisely determine the problem, identify the user community of such problems, and dispatch the correct personnel to eradicate the problem.

Alex Gaber, Director, Business Development and Strategy, *TechExcel, Inc.*

Understanding the IT environment is an increasingly imperative and complex task. The sheer number of IT assets to be managed is often overwhelming. Managing mission critical systems requires a thorough understanding of the dependencies that exist between the components: hardware, software, networks, and users. To bring clarity to the modern IT environment, organizations are implementing ITIL to achieve greater alignment between business and IT.

Within the ITIL framework, the most pivotal aspect is the configuration management database (CMDB). The CMDB manages the relationships that exist between IT assets, service records, problem records, user information, documentation, and more from a single integrated repository. A well-planned CMDB strategy has emerged as the keystone in implementing ITIL successfully.

When implemented properly, the CMDB can help IT provide accountability, audit trails, improve security, ensure compliance, and seamlessly integrate problem/change management. With visibility into IT, it becomes transparent to know who, what, when, where, and why for all your settings and changes that occur. Also, easily track the history of IT infrastructure with a comprehensive and exhaustive audit trail. Security becomes more proactive than reactive, and eliminates the mystery of software license compliance. Lastly, understanding the organizational impact of a change on existing configuration is easier and simpler, therefore allowing IT to better plan and adapt.

Mobility MiddleWare: Vendors and Products

(This is the second in a two-part article series on mobility middleware. Part 1, "Mobility Middleware: The Key to Optimizing Mobile Techs" appeared in the July/August 2007 issue of **SupportWorld**, *and discussed the reasons why companies are interested in the technology.)*

You've made your business case for investing in a mobility middleware solution that will enable maximum utilization and effectiveness from your team. But which vendor/product will best fit your requirements? How should you go about the selection process?

by ***Mikael Blaisdell***

There is a growing interest in maximizing the productivity of service reps by enabling them to access their service management systems from the field. Why require your team to go back to the office to get their next assignments when their "smart-phones" can pull the pertinent information on the spot?

Mikael Blaisdell *has been a writer, analyst, and customer retention architect for over twenty-five years. Reach him at* ***www.mblaisdell.com*** *or by e-mail,* ***mikael@mblaisdell.com.***

At present, there are a handful of vendors who offer mobility middleware solutions. They include: **Aeroprise**, **Mobile Reach**, **Navara**, **Sybase iAnywhere**, **Vaultus**, and **Vettro**. For the purposes of this overview the six manufacturers listed above all completed the same vendor-neutral draft Request for Proposal template, available for free downloading from the following URL: **http://mblaisdell.com/TheHotline/?page_id=37**.

As with all such templates, the above mobility middleware RFP is only a draft, a foundation that will need to be carefully considered and adapted to make sure that all of the appropriate questions are asked. What are "show-stopper" issues for one customer may be of lesser importance to another—what matters is *your* particular priorities and requirements.

The vendor/product selection process for a mobility middleware solution follows the same pattern as most other IT selection projects. Create a set of specific requirements, identify a list of appropriate vendors, submit an RFP, and evaluate the responses. After doing due-diligence research on the manufacturers and getting demos on the products, choose and implement the one that most closely matches your needs and budget.

Hardware/Software Compatibility:

The main components that will be connected by the mobility middleware solution include the service management software system, server operating systems, Wide Area Network (WAN) systems, telephony carriers, handheld devices, and the security systems.

- **Service Management Systems**: Remedy is a standard for all six vendors, although the list of supported functionality within Remedy can vary considerably. Other commonly supported service management/help desk systems include HEAT, Peregrine, Openview, Salesforce, and Siebel.

- **Server Operating Systems**: Windows Server 2000 and 2003 support is offered by all six vendors. Aeroprise, Vaultus, and Vettro also offer support for UNIX-based servers.

- **WAN systems**: The WAN support of the vendors varied. Some vendors claimed certified support for all types—iDEN, GPRS/GSM, CDPT/TDMA, and/or CDMA and higher, while others were more selective.

- **Telephony Carriers**: The extent of partnerships with such firms as Sprint Nextel, Verizon, Cingular (AT&T), and T-Mobile varied considerably amongst the six vendors. Some of the vendors had partnerships with leading Canadian, European, and Asian carriers as well.

- **Handheld Device Support**. Blackberry, Treo, PDAs, barcode readers—the vendors offer support for a wide range of devices. When asked about Apple's new iPhone, the standard response was: Not Yet. In addition to the support offered directly for various devices, the manufacturers also provided different methodologies for implementing custom device profiles.

- **Security**. Most of the vendors offered VPN support; some went quite a bit further and included encryption and extensive administration security functionality.

Implementation Services:

All of the manufacturers offer their own Professional Services teams to take care of implementation projects, and all but Mobile Reach have reseller partners that also can be engaged to do implementation and customization work.

Time estimates given for "typical" implementation projects differed, sometimes considerably, between the vendors. This is to be expected, since the definition of "typical" is anything but when it comes to implementation projects for any kind of service technology.

Customization and Training Services:

Some users of handheld devices will want to personalize or customize how their phone interacts with the systems, and administrators may wish to enable or to disable this level of functionality depending on company policies, etc. Aeroprise, iAnywhere, and Vettro permit both group and user level customizations, while Mobile Reach only supports group customization for handhelds. Vaultus apparently offers both as well, but with some limitations at the user level.

All of the manufacturers offer various options for training, both through their own organizations and through reseller partners.

Marketing and Sales:

All of the listed vendors have both direct sales and authorized reseller channels. A variety of demonstration options are offered, including downloadable demos and different pilot programs. Some vendors offer free pilot programs, while others charge fees for such projects or otherwise limit the application's functionality during such test periods.

Pricing:

The pricing models and methods vary across the different vendors. Both the traditional perpetual-license approach and the new subscription models are offered, with some vendors offering both. The basis is typically per-seat per year, with either fixed or floating licenses and sometimes both being sold. Some vendors also charge for server licenses. (With such variety, it can be a challenge to arrive at an apples to apples pricing comparison.)

Some vendors claim to not charge extra for support under their subscription models, but will charge when the sale is of a perpetual license. All of the vendors' prices for support are within the industry standard range of 18-25 percent per year, with various levels of responsiveness and access channels being marketed.

Support Access and Responsiveness:

Phone and e-mail support is standard, though service level guarantees for responsiveness and performance will vary. Some vendors offer self-service access to Web sites and internal knowledge bases while others do not. Support may also be available through reseller partners.

The Vendors:

Aeroprise, Inc.
Alf Abuhajileh; Sr. Marketing Mgr.
(650) 404-1188 Ext. 118
alf@aeroprise.com
1023 Shoreline Blvd. Suite 150
Mountain View, CA 94043 USA
www.aeroprise.inc
Products:
Aeroprise Mobility
(for department-level deployments)
Aeroprise Mobility Plus
(for enterprise-level deployments)

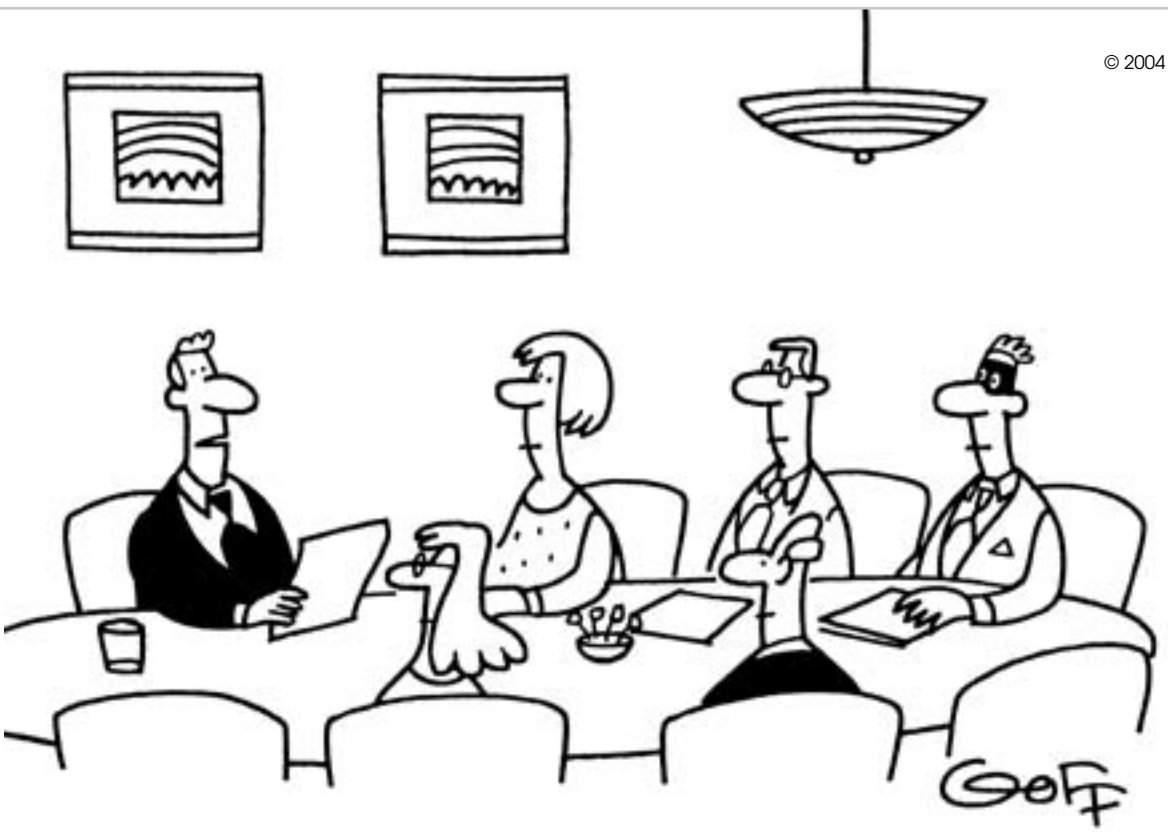
Mobile Reach
info@mobilereach.com
2474 Walnut St. #216
Cary, NC 27518 USA
www.mobilereach.com
Products:
Mobile Reach Splitware
Mobile Reach 7.0

Navara (A Division of RAM Mobile Data)
US Sales & Support
Sales@Navara.com
(404) 399-9536
Post Office Box 55444
Atlanta, GA 30308 USA
www.navara.com
Product:
Navara Mobility Suite

Sybase iAnywhere
(800) 801-2069
contact_us@ianywhere.com
One Sybase Drive
Dublin, CA 94568-7976
www.ianywhere.com
Product:
Information Anywhere Suite

Vaultus Mobile Technologies
(877) 828-5887
Sales@vaultus.com
263 Summer St.
Boston, MA 02210 USA
www.vaultus.com

Vettro Corporation
(212) 967-0200
info@vettro.com
35 West 35th St. 3rd Floor
New York, NY 10001 USA
www.vettro.com
Product:
Vettro 360



"We've found a major flaw in our security procedures."

Help Desk HUMOR

Tech Support: "Where in the building is your printer located?"

Customer: "Middle of my desk."

Tech Support: "If I have to give someone directions, where do I tell them to go?"

Customer: "In the middle of my desk where I work."

Source: http://www.rinkworks.com

Customer: "I paid $1000 for this thing, and now the power button isn't working. I'm pressing it, it's not working, I'm pressing it, it's not working, I'm pressing it, it's not working, I'm pressing it, it's not working, I'm pressing it, it's not working, I'm pressing it, it's not working—"

Tech Support: "Okay, sir, let's—"

Customer: "It's off now, and if I press one of these other buttons on the bottom, it comes on."

Tech Support: "Yes sir, it's designed to do that."

Customer: "If I press and hold the power button..."

Tech Support: "Sir, you don't need to do that."

Customer: "...the backlight comes on."

Tech Support: "Yes sir, it's designed to do that."

Customer: "But the power button isn't working. I'm pressing it, it's not working, I'm pressing it, it's not working, I'm pressing it, it's not working…"

Source: http://www.rinkworks.com

IF IT AIN'T BROKE...

Caller: "I'm having a problem installing your software. I've got a fairly old computer, and when I type 'INSTALL' all it says is 'Bad Command or File Name.'"

Tech Support: "OK, check the directory of the 'A: drive.' Go to 'A:\' and type 'dir.'

Caller reads off a list of file names, including INSTALL.EXE.

Tech Support: "All right, the correct file is there. Type 'INSTALL' again."

Caller: "OK (pause). Still says 'Bad Command or File Name.'"

Tech Support: "Hmmm. The file's there in the correct place. Are you sure you're typing I-N-S-T-A-L-L and hitting the 'Enter' key?"

Caller: "Yes, let me try it again (pause). Nope. It still responds 'Bad Command or File Name.'"

Tech Support: (now really confused) "Are you sure you're typing I-N-S-T-A-L-L and hitting the key that says 'Enter?'"

Caller: "Well, yeah. Although my 'N' key is stuck, so I'm using the 'M' key. Does that matter?"

Source: http://www.phonephunnies.com

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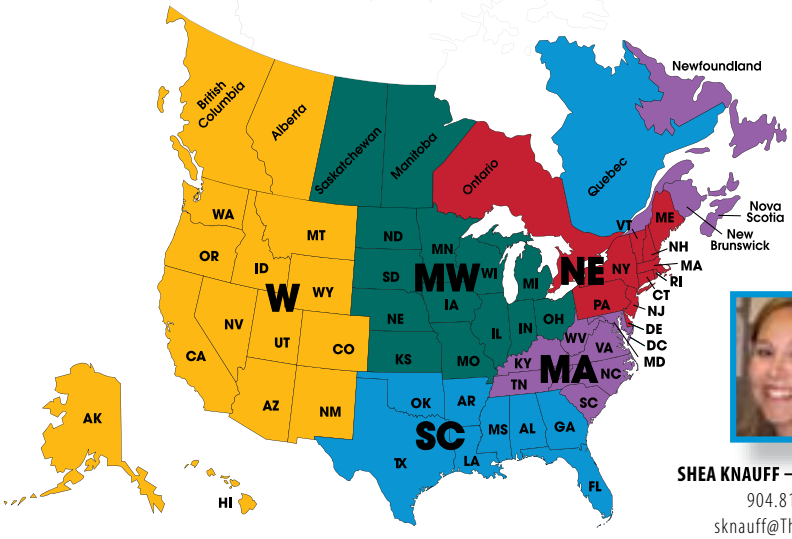

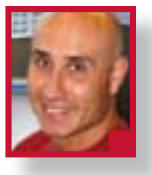

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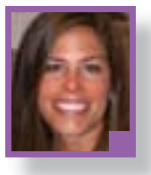

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October/November/December Course Schedule

COURSE	OCTOBER	NOVEMBER	DECEMBER
ITIL® Foundations	**10–12** Toronto, ON ▪ Chicago, IL **17–19** Dallas, TX ▪ New York, NY **22–24** Houston, TX **24–26** Washington, DC ▪ Atlanta, GA **31–Nov 2** Los Angeles, CA	**4–6** Las Vegas, NV	**5–7** Toronto, ON **19–21** Indianapolis, IN
Customer Service Representative	**1st** Arlington, VA	**12th** Dallas, TX ▪ New York, NY ▪ Chicago, IL	
Desktop Support Technician	**1–2** Dallas, TX **29–30** Chicago, IL		**3–4** Atlanta, GA
Support Center Analyst	**1–2** Milwaukee, WI ▪ Scottsdale, AZ ▪ Tampa, FL **15–16** Charlotte, NC ▪ Calgary, AB ▪ Colorado Springs, CO Vancouver, BC **22–23** Philadelphia, PA ▪ Indianapolis, IN ▪ Winnipeg, MB **29–30** Edmonton, AB ▪ Hunt Valley, MD ▪ Orlando, FL	**5–6** Chicago, IL ▪ Dallas, TX ▪ St. Louis, MO New York, NY ▪ Irvine, CA ▪ Halifax, NS **12–13** Atlanta, GA ▪ Washington , DC ▪ Phoenix, AZ Boston, MA **19–20** Vancouver , BC ▪ Edmonton, AB **26–27** Toronto, ON	**3–4** Edmonton, AB ▪ San Diego, CA **10–11** Denver , CO ▪ San Francisco, CA **17–18** Indianapolis, IN
Support Center Team Lead	**8–9** Boston, MA ▪ Chicago, IL **15–16** Dallas, TX ▪ New York, NY **17–18** Vancouver, BC **22–23** Atlanta, GA ▪ Washington, DC **25–26** Oakland, CA ▪ Toronto, ON **29–30** Los Angeles, CA	**12–13** Montreal, QC **21–22** Edmonton, AB	
Support Center Manager	**3–5** Tampa, FL **10–12** Boston, MA **15–17** Vancouver, BC **17–19** Colorado Springs, CO **24–26** Winnipeg, MB ▪ Philadelphia, PA ▪ Indianapolis, IN **29–31** Montreal, QC **31–Nov 2** Edmonton, AB ▪ Hunt Valley, MD ▪ Pittsburgh, PA	**7–9** New York, NY ▪ Irvine, CA ▪ Chicago, IL Halifax, NS **14–16** Phoenix, AZ ▪ Washington, DC ▪ Atlanta, GA **19–21** Edmonton, AB **21–23** Vancouver, BC	**5–7** Edmonton, AB **12–14** Denver, CO ▪ San Francisco, CA
Support Center Director	**16–18** Atlanta, GA	**6–8** Scottsdale, AZ	**4–6** Tampa, FL
Knowledge Management Foundations: KCS℠ Principles	**3–5** Dallas, TX **15–17** Vancouver, BC **17–19** Chicago, IL **29–31** Montreal, QC	**7–9** Toronto, ON	**5–7** Atlanta, GA

Course schedule subject to change

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  July 16-19, 2007 in Seattle, WA

Upcoming Forums:

- Executive Forum
  September 12-14, 2007 in Amelia Island, FL
- Government Forum, Financial Services Forum, Healthcare Providers Forum, Law Forum, Support Center Leadership Forum, and the first Insurance Forum and Retail Forum
  October 9-12, 2007 in Colorado Springs, CO
- Higher Education Forum
  November 5-8, 2007 at Central New Mexico Community College in Albuquerque, NM

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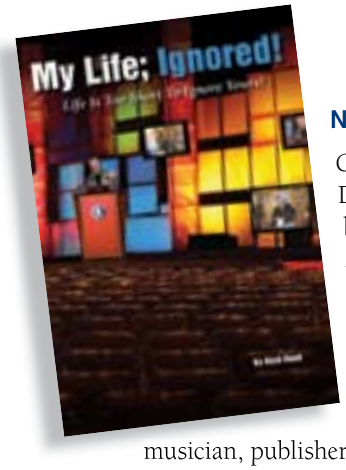

New Book Available!

Get to know HDI's Executive Director up close and personal by reading his "Motivational Autobiography." He will take you on a personal journey of his life growing up, the careers he "chose," famous people he has met and the lessons he learned, and his life as a family man, politician, musician, publisher, and author in an effort to inspire you to take action in your life even if you are, well; ignored!

Rich wants you to read his autobiography because it will motivate you to write yours. He knows that if he is successful it will only help prove you can be too. He hopes you will approach your life story with a reinvigorated passion to fulfill your childhood dreams and your dreams for tomorrow. He knows we will all make an impact in this world just by matter of default. He wants to help you to make yours count! If you are looking to get re-energized in your life's journey, pick up a copy of *My Life; Ignored* and get ready to be motivated.

It's a really great book! *Just ask his mom…*

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