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Sept./Oct. 2008



Support World SM

a Collaborative Model for the Support Center

Strategy

Dangerous Data and Dog Tails
Research

How to Provide Outstanding
Internal Customer Service
Customer Service

Developing the Business Case for ITIL®
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Letter From the Editor



Dear Readers,

Welcome to the latest edition of *SupportWorld*. Our authors tackle a number of key topics in this issue, in ways I think you'll find both interesting and educational.

As an industry, we've made tremendous strides in the management of knowledge, however, for many support center and help desk managers, it is a long-term project. Our content manager, Bob Last, kicks off the magazine with his article, "A Collaborative Model for the Support Center." Bob lends some insightful ideas on managing the knowledge, people, and processes in your organization and offers some limited alternatives to a long-term project with a focus on the short-term.


This issue continues with an article written by Maggie Klenke and Penny Reynolds on workforce staffing. Everyone is struggling to do more with less and to make the most of the resources they already have in place. The authors' "best kept secrets" will help you position your support center for both today's lean times and the better times to come.

Finally, I have included a wonderful how-to article that outlines, in detail, a way to present a business plan for ITIL to your CFO. While many of us know the value ITIL can bring to an organization, explaining this value and persuading the "powers that be" to buy into your plan is a difficult task. Mark Shell explores how to put together a slide show with ROI figures that is sure to bridge the gap and identify the benefits to both the business and IT.

HDI is revving up for the Service Management Conference that will take place October 15-17, 2008 in Miami, FL. This new event will focus on the critical role of support in service management. With conference tracks focusing on processes, workforce management, metrics, and more, this conference offers attendees a chance to network with peers, get inspired, get educated, and have fun! We hope to see you there. You can find out more and register online at www.ThinkHDI.com.

I hope you enjoy this issue of *SupportWorld*. As always, comments and suggestions are welcome from readers at jneider@ThinkHDI.com.

Best Regards,


Julie Neider

Editor-in-Chief

Julie Neider

Art Director

Scott Hanson

SupportWorldSM

Contributors

Donna Earl
Maggie Klenke
Robert Last
Jim McKenna

Mary Nugent
Jenny Rains
Penny Reynolds
Mark Shell

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by **JennyRAINS**

dangerous and

One of the major benefits for members of the HDI community is just that...the community. IT support leaders are able to network, share best practices, and compare their support center's performance with other similar support centers.

As a researcher, there are few things that I enjoy more, on a professional level, than to see managers and directors putting their data to work. It is inspiring to see them analyze and discuss their performance results and make changes based on them. Performance data are of no use sitting in a spreadsheet where they just take up space. If information about support center performance is being collected, then it should be reviewed and even compared with other similar support centers. However, comparing the data can also be dangerous.

While comparing data with peers could be a step in the right direction to improving the service of a support center, it can be misleading as well. Before a support center alters its practices based on peer comparisons, it is crucial to make sure that both support centers are computing the same metric in the same way.

The two support centers must first make sure that they are comparing apples to apples. They may both call it “Abandonment Rate,” but they may not define it in the same way.

For example, what if a support center does not consider a call to be abandoned if the caller hangs up within 10 seconds or less? The Abandonment Rate for that support center would be lower than that of a support center with the exact same performance but considers ANY dropped call to be abandoned.

Data Dog Tails

Evidence of the variety of definitions used by support centers for the same metric was seen in 2007. Over 1,000 support centers were asked how they define “First Call Resolution (FCR).” About half define FCR as an incident resolved by the person who receives the call. The other half is split up between the following definitions: “The incident is resolved without hierarchical escalation (22%),” “The incident is resolved by any level as long as it is resolved on the initial call (17%),” “The ticket is closed within X minutes of being opened (5%),” and “Other (4%).”

The importance of defining metrics might be more easily explained with a more tangible example:

A man and a woman discussing their dogs discover that they both own the same breed and same age puppies. The man has had concerns that his puppy is not growing as it should be, so he asks the woman how big her dog is. The woman goes home and measures her puppy from his snout to the end of his tail. The man measures his puppy from snout to rear and does not include the tail in his measurement. The woman reports the length of her dog back to the man. When he compares her measurement with his, he decides that his concern is legit; his dog is way too small.

This example illustrates that even though the two dog owners are measuring the same metric (length) in the same units (inches), it is not appropriate to compare the two. If, at some point, they had discussed their definitions of “dog length” the man would know that he must adjust for

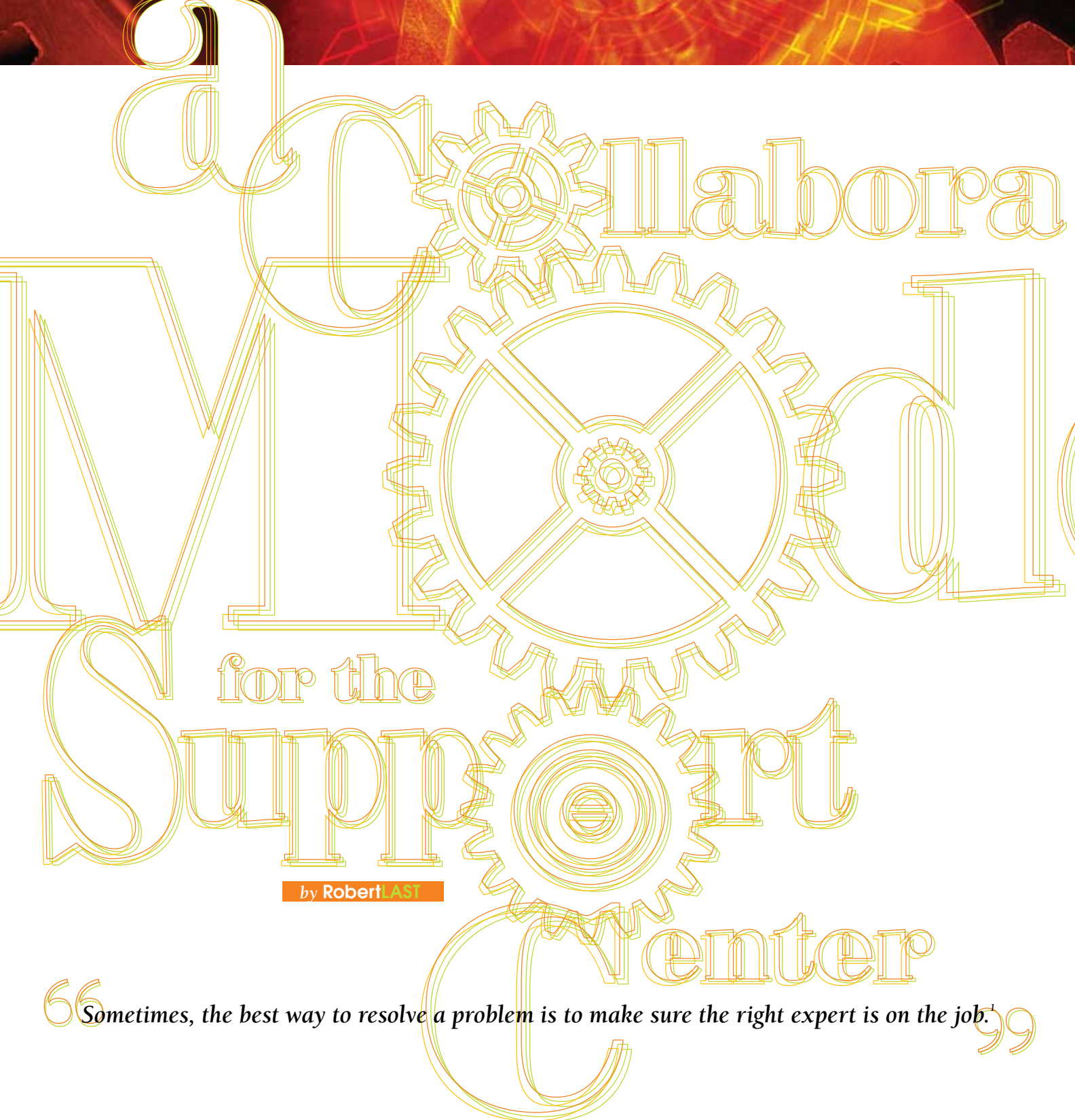
the length of the dog’s tail. Then, maybe he would not have doubled his now obese puppy’s daily serving of dog food.

Similar to the man adjusting the amount of dog food for his puppy, the danger of support centers comparing misaligned metrics comes when managers and executives make changes based on these comparisons. For instance, go back to the Abandonment Rate example above. Suppose the two support center managers are evaluating their Abandonment Rates without discussing their definitions of the metric beforehand. They assume that the support center defining all dropped calls as “abandoned” has lower performance because it has the higher Abandonment Rate. While in reality, the support center with the lower abandonment rate, who removes all dropped calls with the 10 second threshold from its calculation, is performing worse. To his detriment, without knowing about the discrepancy in their measures, the manager with the higher abandonment rate makes changes to his support center based on the advice of his colleague. The changes, in turn, lead to even lower performance on this metric.

Performance data is a very useful resource for support center managers, and it should be utilized to make positive changes to the support center’s service. However, when comparing the data with other support centers, the time must be taken to decide if the metrics are even comparable. If support centers are defining metrics differently, this must be taken into consideration when making comparisons. This process might seem particular or even tedious to some. But, if a support center is willing to change its practices based on its supposedly subpar performance, they better make sure they are comparing apples to apples...or tails to tails.

7





“Sometimes, the best way to resolve a problem is to make sure the right expert is on the job.”

The authors of this wonderful quote could not have made a more perceptive observation if they tried. In one sentence they have identified one of the support industry’s biggest problems and simultaneously provided a solution to that problem, and while this author’s analysis of their statement and subsequent commentary may be flawed, the key point in this article is that **collaboration in a support center is an exciting and positive trend that should be encouraged.**

¹ *Collective Wisdom-Transforming Support with Knowledge*, Francoise Tourniaire and David Kay, (Colorado Springs, CO: HDI 2006), 174.

tive

AI

The problem, in general, is that all too often the convergence of people, processes, and technology have not produced the increased problem resolution rates, time savings, and reduced costs that we all thought they would. For example, "...the percent of calls answered in less than 10 seconds has fallen nearly 12 percent since 1997; with the average speed of answer jumping 69 percent from 23 seconds to 39 seconds. The percent of calls abandoned by those tired of waiting for an agent more than doubled from 6 to 13.6 percent.² The problem, specifically, is a bit more complicated. Many support managers have been trained to prevent their employees from speaking to the right person and thus delaying the resolution of the customer's problem.

Almost every support center or help desk manager on the planet was taught that the cost per call of an operation has to be driven as low as possible and when they see more than two people standing together talking, they immediately start calculating the cost of that call, relative to the revenue of the operation. What they're doing is using an industrial-model of production analysis that values the short-term savings of operating costs over the long-term value of a customer relationship. (For those of you that are now throwing the magazine across the room and are enthusiastically cursing me, I can be contacted at RLast@thinkhdi.com and I welcome all comments and suggestions.)

² "Call Center Performance Worsens," Mark Hall, June 6 2008, URL: http://blogs.computerworld.com/bad_call_centers.

Why Collaboration Is Good

One of the best, but least well known generals in the British Army of the Napoleonic Wars, Sir John Moore, was once asked by an architect building an army camp, where the general thought the paths to the mess hall should go. General Moore replied that the paths should be built where the soldiers walked most often. Translation: **Every person in a support center and especially the rookies, know what path to follow to the smart people that are easy to work with** (let's be honest, not all of the smart people in a support center or an IT operation are easy to work with). The trick is to construct a system that allows the following:

- ☀ The right questions to be asked and the right answers to be given in an expeditious manner (no level 2 to level 1 games of Q & A ping-pong)—from the customer's perspective; remember, they don't care about any of these considerations;
- ☀ Decreasing the time to resolution while increasing the resolution rate;
- ☀ Not exhausting "the smart people" with repeated intrusions;
- ☀ Building a series of easy-to-use processes that everyone in the support center can quickly learn and use without indulging in culture change and deep philosophical conversations;³ they have their place, but we're talking short-term here; and
- ☀ Positioning the entire process (whatever it may be) in a manner that allows for the implementation of Knowledge-centered SupportSM (KCS) over the long-term while making day-to-day activities more efficient.

No one said this was going to be easy and as Tourniaire and Kay observe, "Collaboration does have a place in support centers, but only if it is managed and integrated with knowledge and case management. It's great to find the expert, but it's not okay to end-run the escalation workflow, and staffers must capture and share the knowledge gained."⁴ So the question remains, what can be done in the short-term that doesn't hurt in the long-term?

³ For example, in the widely popular book, *Wikinomics-How Mass Collaboration Changes Everything*, the authors Don Tapscott and Anthony D. Williams quote Socialtext founder, Ross Mayfield, who is fond of saying, "The new Web is about verbs, not nouns." (P. 46). As one support center manager commented to the author last year, I don't know what that means in the real world. I have to answer the phone, e-mail, and chat queries 20,000 times a month. This sounds like something that should be on a T-shirt at the next Consumer Electronics Show; not helpful."

⁴ *Op cit*, Tourniaire and Kay, page 174.

Some Suggested Building Blocks for a Collaborative Model

Number 1

Knowledge Inventory. Almost everyone knows what everyone knows, but almost everyone has their areas of expertise that haven't been identified yet and such areas need to be in a matrix that everyone can access. It doesn't need to be as thick as a law school text book, but it does need to point people with questions in the correct direction.

Number 2

Visits. Support people have been seeking out assistance from each other for decades and support supervisors and managers have been interrupting them from doing so for decades. Stop interrupting them and let them work, just remind that the visits have to be productive, of a reasonable length, and the results not lost to history.

Number 3

Chat Rooms and IM. For those of us of above a certain age, chat rooms are a destination that few of us will travel to, much less find useful, but for people of other demographic groups they can be an energizing source of information and community. Assuming the IT security people allow chat rooms to be installed for internal use, let employees use them as a problem solving and troubleshooting tool. Software companies have been using them for years to drive down call volume. Keep its use internal, but otherwise, let them "have at it," as the saying goes. Six people collaborating in a chat room on a problem is better, usually, than six people in one cubicle; and don't forget about paint chat.

Number 4

White Boards. There was a time when white boards in a support center were as common as switchboards and in many organizations their use seems to have gone the way of the switchboard. It's time to bring them back and let smart people "work the problem" as Gene Kranz used to say. (Note: If you missed the reference, rent the Tom Hanks movie, *Apollo 13*).







Number 5

Water Cooler Talk. There aren't many water coolers in offices today, but the concept of "water cooler talk," like tier 1 analysts finding their way to a senior person's desk, have generally been seen as an unproductive use of an employee's time, but that stereotype is being replaced with the wisdom that, "In the new economy, conversations are the most important form of work. Conversations are the way knowledge workers discover what they know, share it with their colleagues, and in the process create new knowledge for the organization."⁵

⁵ *Working Knowledge-How Organizations Manage What They Know*, Thomas H. Davenport and Laurence Prusak, (Boston, MA: Harvard Business School Press, 2000), 90.

Number 6

Quality Knowledge. With all of these people working together, talking, and generating possible solutions and answers, some useful and not so useful ideas, information, and knowledge is going to be generated and entered into some form of a knowledge base. In a philosophical sense, it is all valuable, but in a practical sense where a support center is taking 20,000 queries a month, it may not always get the attention it deserves. Producing quality knowledge involves six steps:⁶

-  *Step 1-Define the problem space.* Start by identifying all of the potential problems that may result in a case to the support center. Why spend the effort adding knowledge that no one will ever read?
-  *Step 2-Define the scope of your knowledge base.* When you market a knowledge base, you need to make sure that you have coverage for what you market.
-  *Step 3-Review the [knowledge] articles for usability and understanding—edit for your audience.* You should always remember who your audience is. This will help you determine the level of detail to include and the language that you can use.
-  *Step 4-Organize and tag content for quick access.* When organizing your content, try to think like a customer. Author's Note: Probably the best advice any of us will ever receive in our careers.
-  *Step 5-Engineer diagnostics for troubleshooters.* Sometimes customers are not able to describe a problem with sufficient detail for you to be able to provide an answer. In these cases, you need to ask additional questions to determine what the real problem is. Once you understand the problem, you can provide the answer. Ask questions that can be confirmed by the customer, providing the steps necessary to answer the question.
-  *Step 6-Establish and follow knowledge management (KM) format and writing standards.* You will need to establish and adhere to KM format and writing standards. Author's Note: This can sometimes be difficult for your employees that have just graduated from college because, like most of the workforce, they don't write very well. This is where templates are critical.

⁶ *Knowledge Management*, Chris Farver, Richard Joslin and Char LaBounty (Colorado Springs, CO: HDI, 2001) 20-22.

Concluding Thoughts

As an industry, we've made tremendous strides in the management of knowledge, and the work that the Consortium for Service Innovation (www.serviceinnovation.org) and HDI have done in Knowledge-centered Support (KCS) is on the cutting edge of service innovation (it's readable too). For many support center and help desk managers, however, it is a long-term project to be implemented in-between emergencies.

In this article, what the author has tried to do is offer some limited alternatives to a long-term project and focus on the short-term. If the reader has more questions than answers, the article has been successful; we're just getting started. If you have any suggestions, stories or complaints about the short-term, let the author know at Rlast@thinkhdi.com.



Robert S. Last is the content manager for HDI. For more than twenty years he has been involved in the IT technical support field as a manager, trainer, consultant, and industry analyst. He is the author of dozens of articles, white papers, and HDI focus books on a wide range of topics related to all aspects of technical support and is the author of the soon to be released book, How to Be a Successful Support Center Analyst. He also supports the HDI membership and staff by managing the "Ask the Expert" service on the HDI Web site.

Bob is a graduate of Cleveland State University with a B.A. in urban studies and an M.A. in history. He also holds certificates in disaster recovery planning, management, and instructional design. He is an HDI certified Support Center Analyst and Support Center Manager.



Robert

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HOW TO PROVIDE OUTSTANDING

The foundation for outstanding internal customer service is excellent interdepartmental communication and cooperation. Dialogue between internal customers and internal providers (or vendors) must include agreements about the following topics:

CLEAR EXPECTATIONS

1

An internal provider of service is responsible for setting clear guidelines about what internal customers can reasonably expect. Some organizations implement Service Level Agreements (SLAs) defining what internal customers can expect from internal service providers. Even without formal SLAs, internal customer service can be exceptional IF the internal service provider has clarified to internal customers what expectations are reasonable. Customers also must communicate expectations regarding timeline and quality in advance of requests. Last minute requests are typically due to poor planning on the part of the internal customer. Expecting the internal provider to 'hijack' priorities to meet unreasonable needs is inappropriate, and should be dealt with on a case-by-case basis, with involvement by upper management. At no time should this become the norm, or the internal customer will become 'trained' to expect the unrealistic.

INTERNAL CUSTOMER SERVICE

by DonnaEARL

CUSTOMER RESPONSIBILITIES

2

To meet expectations, internal providers of service are responsible for clarifying what is needed from the internal customer, and also clarifying service provider processes and timelines necessary to meet quality requirements of customers. The phrase "Help me help you" from the movie "Jerry Maguire" applies here.

In order to provide the best customer service, internal providers need the cooperation of customers in allowing enough lead time and providing information and materials necessary to fulfill customer requests. This is a communication responsibility of the internal service provider to let the customer know "What I need from you in order to meet your request is..." It's essential to have an understanding with customers about realistic timelines and quality expectations. Internal providers who find they're constantly working on customer 'emergencies' must clarify to customers the strain this causes to the provider. Constant emergencies diminish the provider's ability to give good service to all internal customers, and create a stressful working environment (not to mention interdepartmental animosity).

SERVICE PROVIDER RESPONSIBILITIES

3

Most internal customer service problems are a result of the 'silo' mentality where people and departments work in isolation, consider only their own priorities, and think others are sitting around twiddling their thumbs with nothing to do until an internal customer screams "Jump!" in a last minute panic. This is sure to guarantee lower levels of quality, resentment from the provider, and a reputation for lack of professionalism on part of the customer. Customers must take responsibility for understanding how their request fits into the overall workflow of the organization and internal service provider's workflow. Internal service providers are responsible for explaining their workflow, so the customer will understand he or she isn't the only priority.

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NEGOTIATED PRIORITIES

4

While most customer priorities are 'urgent—must have right away' this is counterproductive to any process. A clear communication between internal customers and service providers is essential. With internal customer service, most customers believe the provider should intuitively understand priorities because they all work for the same organization. This is false! A discussion about priorities must be part of the expectation-setting talk.

TIPS for Internal Customer Service Providers

- 1 *Always know your customers' expectations, and be a part of their expectation setting.* If they have false or unrealistic expectations, explain your workflow, priorities, processes, and timelines in providing top quality service for them.
- 2 *To help your customers utilize your services better, explain how they can be 'good customers.'* Be explicit about what you need from them in order to meet their needs. Define timelines and quality levels. Let them know what they can expect from you. As an internal provider, tactfully tell the customers how they fit into your workload, and listen to their delivery needs. Negotiate delivery dates and quality levels.
- 3 *Always keep customers informed on project progress.* Nobody likes to be blindsided by delays or last minute requests for additional information.
- 4 *Get out of your 'silo.'* Take a break with co-workers from another part of your organization. Talk to them during lunch about what's happening in their department. We all work so hard we can become myopic, lack perspective, and be ignorant about how other functions operate.
- 5 *Open your vision to the big picture.* When talking to co-workers from other departments, develop an understanding of how the whole organization works. How does your contribution fit into the big picture? What do other departments need from you to meet their goals? Think outside your function and department, and think holistically.

TIPS for Internal Customers

- 1 *Discuss your expectations with your service provider.* Make sure your expectations regarding timelines and quality levels are realistic. Ask your internal service provider what you must provide so they can meet your needs. Ask what their process is, and understand what is involved in delivering your request on time, and meeting your quality standards.
- 2 *Use effective time management practices.* Once you understand your service provider's process, develop your timeline for delivering the request. Certainly 'emergencies' happen, and service providers can be pressured to meet tight deadlines. However, customers who consistently expect providers to 'bend the rules' to meet emergency deadlines strain their service providers and disrupt everyone's priorities. Customers who operate in 'emergency' mode have a negative impact on the workflow as a whole, and cheat others who have planned more realistically.
- 3 *Provide all information needed to fill your request.* In your original request, include sufficient information to allow the provider to adequately estimate the time and resources needed. Be prepared to provide additional information requested by the provider.
- 4 *Always be professional.* Honor the provider's priorities, workflow, and processes. Do not expect 'exceptions' to the rule, especially if poor planning has created your urgency. If your work were delayed due to another customer's 'crisis,' how would it impact your goals?



Donna Earl is an internationally recognized specialist in customer service. As the Help Desk Coach, she addresses the unique challenges of supporting internal customers and users. Donna coaches help desk support professionals on strategies to produce excellent internal customer satisfaction. Donna Earl can be contacted at 415.929.8110 or through www.HelpDeskCoach.com.



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Workshop 203: *Manage Service Change and Deployment: Integrating Change, Release and Deployment, and Service Asset and Configuration*

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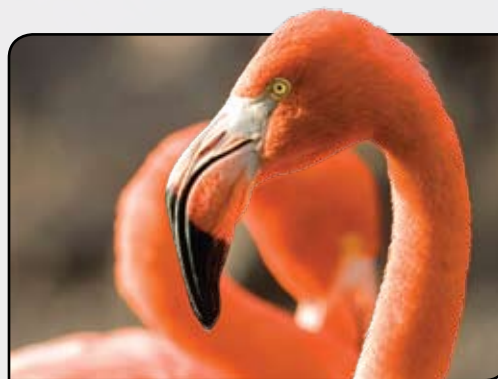
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by Maggie Klenke and Penny Reynolds



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The term “workforce optimization” is getting a lot of attention in the press lately, given the impact of the slowed economy. Everyone is struggling to do more with less—to make the most of the resources they have in place before making new investments in implementing technology or adding additional staff.

So where do you begin in optimizing your call center workforce? This article will outline some of the “best kept secrets” of making the most of your precious resources. It will help you focus your energies in the areas that have the most potential impact without risking long-term negative impacts. These strategies will help position your call center for both today’s lean times and the better ones that will surely follow.

Secret #1

Cutting staff will not necessarily result in cost savings.

Since 65 to 70 percent of a total call center's operating costs are related to staffing, that is generally the first place we look to reduce costs. It is all too common to think of layoffs and reduction in staff as a way to respond to the call from senior management to tighten belts. But before you write up the pink slips, make sure you understand the implications of staff reductions.

Let's assume that you're a fairly small call center with fewer than 50 agent seats. (If you're a larger center, you can view these numbers as representative of a specialized agent group within the bigger call center structure.) Most days you're meeting your service goal of 70 percent in 30 seconds. The snapshot below indicates the staffing picture with varying numbers of staff during a half-hour in which you're getting 175 calls.

Number of Staff	Avg Delay (ASA)	Service Level (in 30 sec)	Staff Occupancy
30	298 sec	24 %	97%
31	107 sec	46%	94%
32	54 sec	62%	91%
33	30 sec	74%	88%
34	18 sec	82%	86%
35	11 sec	88%	83%

As you can see, staffing with 33 "bodies in chairs" would enable you to meet service level fairly consistently. But the loss of one person would worsen service level from 74 to 62 percent (or average speed of answer from 30 seconds to 54 seconds). Eliminating another person would drop service level to 46 percent, and the average delay would double to 107 seconds! And reducing staffing levels by three would horribly deteriorate service level to only 24 percent, resulting in an average delay of 298 seconds! So, those callers accustomed to waiting for only half a minute in queue would now be waiting nearly five minutes!

But some call centers are making the decision to let their staffing levels drop under the assumption that they "can't afford" the incremental staff.

But what many don't realize is that some reductions in staff might be outweighed by the increased telephone costs associated with the longer delay times. In this example, with 33 staff in place, the average delay is 30 seconds per call. Multiply that by 350 calls per hour and that's 10,500 seconds (or 175 minutes) of delay. If we apply a fully loaded telephone cost per minute to that usage of \$.06 per minute, that's \$10.50 for the queue time. If we try and staff with 30 staff, remember our average delay increases to 298 seconds of delay. Multiply that by 350 calls and that's 1,738 minutes of delay, priced at \$.06 for a total of \$104.30 for the queue time that hour. In other words, by eliminating three staff to save money, we've just increased our telephone bill by \$93.80 for that hour! And this doesn't even take into account the likelihood of a longer call

given the poorer than expected service levels. Telephone charges would likely increase even further!

This situation is even more dangerous in a revenue-producing center. If the value of a contact is \$50, and agent salaries are \$20 per hour, it is easy to see that putting another agent on the phone will pay for itself even if the agent only answers one call per hour that would otherwise have abandoned from the queue. But even if the value of the call is only \$5, there is clearly a trade-off in determining the staffing level that will produce the highest net bottom line. The return on appropriate staffing must be argued against budget constraints.

But if not a staff cut, then where should you look for savings opportunities in your center?

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Secret #2

One of the biggest opportunities for savings comes from consolidation of workload.

One of the most important concepts to understand about call center staffing is the principle of economies of scale. Simply put, the bigger the agent group the better.

As the size of the team increases to meet an increased workload, the utilization of every individual within the group improves. So, look for ways to combine smaller groups. Cross-train personnel and look for ways to use skill-based routing to tap into everyone in the site who can handle every call type. The benefits in reduced staffing can be tremendous as seen in the following example.

Number of Calls	Erlang Workload	Staff for 30 sec ASA	Staff/Work Ratio	Staff Occupancy
100	10	14	1.40	.71
500	50	56	1.12	.89
1000	100	106	1.06	.94
2000	200	209	1.04	.96

The call center agent group handling the 100 calls will require 14 staff, with each agent busy only 71 percent of the time. Five of these groups would require 70 agents. But if all the work of the five groups could be consolidated and funneled into a single group, only 56 staff would be needed, with each agent busy 89 percent of the time.

This is a clear example of how altering the workload by cross-training and consolidating groups can result

in a decreased need for staff without affecting service negatively. In fact, service may even improve, depending on the level of staff reductions you decide to make.

And the economies improve as the size of the agent group (and amount of workload) increases. But bigger is better only to a certain point...which leads us to our next secret.

Secret #3

Bigger groups are more efficient only to a certain point...then consolidation backfires.

Some call centers get carried away by the power of pooling. In our last example, to squeeze out another few headcount savings, you might assume that you'd want to take the two 106 agent groups and consolidate the workload into one group that requires only 209 staff rather than 212. Wrong. At this point, we've reached the point where efficiencies are too high. And while you might think there is no such thing as "too efficient," it is a fact that groups of this size have such high occupancies that they really can't maintain that efficiency level for very long without agents burning out or displaying some very undesirable behaviors in order to get a breather between calls.

Process Reengineering—

Perhaps some of the biggest opportunities for savings lie in simply changing some of our processes and procedures, which brings us to our next few secrets.

Secret #4

Better calculations of workforce shrinkage can earn you some improvements.

Workforce shrinkage (the amount of time agents are paid to be there but are not available to take calls) includes some things that are not changeable such as vacations and coffee breaks. But there is often a fair amount of time lost in agents just not being in place and available when the schedule is expecting them to be.

And sometimes fixing the problem is as simple as a math error. For example, if you've determined that you need 150 "bodies in chairs" between 3-4pm, and you know your shrinkage for breaks, meetings, training, off-phone work, etc. is 32 percent, then how many staff do you actually need to schedule so that 150 are actually in their seats ready to handle calls? A common math mistake is to simply inflate 150 by 33 percent ($150 \times 1.33 = 199$ staff). Wrong answer. Check it by decreasing 199 by 33 percent—you only get 133 staff! The correct calculation is 150 divided by (1 minus shrinkage) or 67 percent for a correct answer of 224 staff.

Focusing on getting the maximum logged in time from each agent can be a significant opportunity since the lost time to unexplained unavailability ranges from 2 to 10 percent in many centers. In our example above, tightening up shrinkage just from 32 to 30 percent (only a 2 percent improvement) will reduce scheduled staff needs from 224 staff to 214 staff!

Secret #5

An expanded schedule mix can easily result in overall headcount savings.

Another place to look for efficiencies is in the variety of schedule options you use in matching your call center workforce to the workload. If most of your agents work full-time, 8-hour schedules, then schedule inflexibility is a problem. It's amazing how much more efficient your schedules will be simply by adding some part-time (3-, 4-, 5-, and 6-hour shifts) and expanding the definition of full-time to include more than just five 8-hour days.

To illustrate the savings achievable, one call center that recently implemented workforce management software expanded their schedule mix from only 4-hour part-time and 8-hour full-time schedules to include 5-hour, 6-hour and 10-hour shifts. By making these simple changes the overall FTE count went from 189 staff to 152 staff—a 20 percent reduction in staff requirements and actually a better, more consistent level of service!

Another call center for a major catalog company, shifted from traditional 30-minute start times to having staff begin their shifts every 15-minutes of the day. The rationale of this change was that by staggering start times, breaks and other off-phone activities could naturally be staggered throughout the day as well. And it worked! By staggering these start times, the call center went from 124 staff required to only 114 staff—an 8 percent savings by this simple adjustment.

Education and Tools—

One of the distinctions between a “best of class” call center operation and an average one is the focus the organization has on empowering their agents and supervisors with the education and tools needed to be successful.

Secret #6

Equip agents with workforce management knowledge.

Part of the secret to reducing the shrinkage outlined earlier is to get the frontline staff to adhere more closely to their work schedules. And in many cases the strategy is simply informing them of the impact they have by not being in

their seats on time. Most are unaware of the effect on service that a single person has, or why it's not ok to “just make-up the time later in the day.”

Take some of your own numbers and put together a simple 20-minute training session for your next team meeting on staffing to meet service goals, and how one person out of their seat will affect not just service, but how hard the rest of the group has to work to keep up. That “moment of aha” can result in immediate improvements in adherence, and in turn reduce shrinkage and headcount requirements.

Secret #7

Equip supervisors with workforce management tools.

Part of the dilemma in workforce management is to track schedule changes and exceptions in a timely fashion in order to manage service level on a real-time basis. The easier you can make it to request schedule changes and report exceptions, the better—for both frontline staff as well as supervisors. Tools like real-time adherence monitoring can substantially reduce the time supervisors must take to look at agent ACD status and then match up to schedule information to ensure everyone's doing what they're supposed to be doing. These tools result in better control of adherence with much less effort on the supervisors' part, freeing them up to do more important tasks like coaching for improved quality and performance.

Secret #8

Handling e-mails with the same response time as incoming voice calls may be reasonable and desirable.

It is clear that more customers are choosing to communicate with our companies through e-mail. Some centers are already handling this additional workload and the rest will likely add it in the near future. Typical goals for responding to e-mails range from a few hours to a few days. With the automated response system acknowledging that the company has received the request and letting the customer know when to expect a reply, delays of hours or days seem acceptable. But is it the best choice?

What do you do if you send an e-mail to a company and you don't get a response in the time you require? Do you send another e-mail? Maybe you just call. But whichever you do, what happens to the original e-mail? It just sits in the queue until an agent gets to it and they process it, even if the question was answered already (unless a very sophisticated contact management system informs the agent it has been handled). This creates incremental work for the center and the risk that the answers given the customer don't match.

The reason centers generally set longer response time goals for e-mails than phone calls is that they believe it will reduce costs. But the workload is the same whether the work is done now or later (assuming the customer does not e-mail or call again while waiting). The only potential savings is in the difference between staffing for a sequential workload and a randomly arriving one. So assuming the 56 person workgroup in Secret #2's chart above, the incremental staff for calls is 6 people over what it would be if 50 people did 50 hours of e-mail work from the backlog over the same period. But that assumes that the e-mail team can be worked at 100 percent occupancy and that is not realistic. If you make a more reasonable assumption of 90 percent occupancy, you are back to needing the same staff for the e-mails as you do for the phone calls.

So why not answer e-mails as they arrive just like calls? It would amaze your customers and confound your competition! Your costs would likely be the same or possibly less. Of course, the e-mails will come at all hours whether the phone lines are open or not. So if the center is not already a 24 hour shop, be aware of this potential increase in hours of operation.

Secret #9

Scheduling blocks of time for other types of work may be the best way to accomplish workload blending.

Now that the center is handling both calls and e-mails, it is time to decide how best to distribute the work among the agent team. Let's assume your center has the same 56 staff handling telephone calls mentioned in the chart in Secret #2. This is the staffing needed to meet a 30 second ASA. Now the e-mail load must be handled. The occupancy level of those phone agents is 89%, leaving only 6.6 minutes per hour available for any other activity (or just taking a breath between calls). And these 6.6 minutes will not come all at once, but will be in several between-call units ranging from a few seconds to a minute or two. You can set up a separate team for the e-mail handling or you can blend the e-mail work with the telephone calls, fitting it in between calls. (Of course, blending assumes that the agents are capable of doing the written work as well as the telephone work.) The question is whether blending on a contact-by-contact basis is the best choice, or if a schedule that includes dedicated blocks of time for each kind of contact would be more effective.

If concentration is required to complete an e-mail response effectively, then blending the contacts is risky. The agent may be interrupted during e-mail processing by a new incoming phone call, resulting in the need to rethink the e-mail later extending AHT, and in potential errors. Some agents may be able to switch media quickly and effectively, while others need to focus on one thing at a time. So most

centers that have chosen to handle multi-media in their centers have elected to schedule blocks of time that an agent works on each type of contact they can handle. The blocks can be an entire shift or week, but more commonly are for an hour or two within a shift. This allows the agents to keep their skills active and get some variety in the workday.

Secret #10

Blending workload is a much better opportunity for small call centers than large ones.

Blending various types of workload holds a promise for efficiency that was first introduced by the automated dialer vendors touting the glories of blending inbound and outbound calls. Now we are getting suggestions that blending calls and other media should work well too, since many of our agents have idle time on their hands that needs to be filled. There are centers that have scheduling restrictions that make it necessary to have more people than needed in lulls just to cover peaks. These centers are the best candidates for blending. But with reasonable scheduling flexibility, the lulls are used as times for breaks and training, and part-time personnel give us the chance to reduce staff during low volume periods as well. So few centers have staff with enough idle time to make blending effective or even viable. This is another situation where economies of scale have an effect. In a large center, the occupancy of staff is quite high as noted in Secret #2 above. But in a smaller center, or in a small, dedicated agent team in a big center, the occupancy levels can drop to allow room for some "filler" work. So while it seems like only a big center could afford the technologies needed to make blending workable, it is smaller situations where it can be the most useful.

Summary

The secrets we've outlined here are nothing new. They're proven techniques and strategies that are working well in "best of class" call center operations around the globe. These are strategies that will not only serve to optimize your workforce today in these tough economic times, but will position your center for continued success in the good times that are just ahead.



Penny Reynolds and Maggie Klenke are co-founders and Senior Partners with *The Call Center School*, a Nashville, Tennessee based consulting and education company. The company provides a wide range of educational offerings for call center professionals, including traditional classroom courses, web-based seminars, and self-paced e-learning programs. For more information, see www.thecallcenterschool.com or call 615-812-8400.



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BOOK REVIEW

What's the Secret? To Providing a World-Class Customer Experience

The American Customer Satisfaction Index (www.theacsi.org) took its first national measure of the state of customer service satisfaction in the third quarter of 1994 (74.8). In the first quarter of 2008, the ACSI was 75.2. In intervening years, the highest score it has reached was 75.3, not exactly the kind of performance that one would expect in over a decade of time that has witnessed the greatest explosion of technology and knowledge in the history of the human race. Are we, as a society and as an industry, missing something in how we manage our service and support operations?

If I told you the secret to solving all, or at least most your customer service and support problems, would you be willing to send money to my Cayman Islands account? Just kidding, (well almost).

Seriously, I read a dozen books a year on customer service and support and most of them are interesting, but unremarkable. They are long on theory, but usually not very practical for the working support manager. A happy exception is John DiJulius's excellent and practical, *What's the secret? To Providing a World-Class Customer Experience*. The name DiJulius will be a familiar one to many people from the John Robert's Spas and The DiJulius Group consulting organization.

In fourteen well-written chapters, DiJulius first examines "The Customer Service Crisis" and provides one of the best discussions of the crisis I've read in some time, and he does so with just enough statistics to make his point. He also raises four excellent questions in the preface designed to strike fear into the hearts and minds of managers and executives everywhere:

- ◆ What's the secret to why good customer service is so hard to find today?
- ◆ What's the secret to why it is so hard to find employees who know how to deliver it?
- ◆ What's the secret to why companies don't train their people better?
- ◆ What's the secret to why companies don't see the value in providing good customer service?

Once past the preface, DiJulius begins an in-depth discussion of the customer crisis with chapters that ask, discuss, or explore the following:

- ◆ Definitive proof of the return on investment (ROI) in providing superior service.
- ◆ Is your company part of the customer service revolution?
- ◆ What prevents companies/organizations from being world-class?
- ◆ What level of service is your company/organization at?

These chapters are easy to read, but not for people that are incapable of intellectual honesty. DiJulius discusses everything from the importance of a service vision, to service systems, to creating a service culture, to leadership. These concepts and their companions are organized in the usual style of commandments.

For example, "The Fourth Commandment: Secret Service Systems—Utilizing Customer Intelligence to Personalize their Experience and Engage and Anticipate their Needs," is one of the best examples of how to build and maintain a service system that is not in a textbook.

The entire book is full of inspiring quotes, is well researched, and cited. DiJulius believes passionately in what he is writing about and delivers like a management consultant when he should, but never loses a friendly touch that makes the book easy-to-read and use as a reference book. This is a good, fun, and essential book for mid-level managers and executives that are serious about improving their service and support operations. If you read only one book on service management this year, let it be this one.

John R. DiJulius, III. (Hoboken, NJ: John Wiley & Sons, Inc, 2008), ISBN #: 978-0-470-19612-0, (320 pages)

STATE	CITY	CHAPTER NAME	CHAPTER CONTACT	POSITION	EMAIL ADDRESS	PHONE NUMBER	CHAPTER WEB SITE
AZ	Phoenix	Southwest Synergy	Kerry Flanagan	VP Membership	kerry.flanagan@dhl.com	480-375-7095	www.azhdi.com
AB	Calgary	Calgary	Sheila Voll	President	info@hdi-calgary.org	403-681-2746	www.hdi-calgary.org
AB	Edmonton	HDI Edmonton	Rona Chin	VP Membership	rona.chin@rht.com	780-426-6642	www.edmontonhdi.com
BC	Vancouver	HelpDesk BC	Clare Agapeyev	President	clareagapeyev@sierrasystems.com	604-692-4614	www.helpdeskbc.com
BC	Victoria Island	Vancouver Island	Norma Loudon	President	loudenn@saainch.ca	250-475-5494	www.ThinkHDI.com/chapters/vihdc
CA	Irvine	Orange County	Tami Hill	President	tami.hill@yum.com	949-863-8388	www.ochdi.com
CA	Los Angeles	Los Angeles	Mary Cruse	President	mary.cruise@genzyme.com	310-482-5316	www.hdila.org
CA	Sacramento	Sacramento	Sean Moore	President	sean.moore@blueshieldca.com	916-350-8904	www.ThinkHDI.com/chapters/sacramento
CA	San Diego	San Diego	Cynthia Monroe	President	cmonroe@sddpc.org	858-581-7868	www.ThinkHDI.com/chapters/sandiego
CA	San Francisco	Bay Area	Justine Nguyen	President	bayareahdi@gmail.com	415-344-2069	www.ThinkHDI.com/chapters/sfndi
CA	San Jose	Silicon Valley	Rob Matheson	President	rob@drivesavers.com	800-440-1904	www.svhdi.com
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DC	Washington	Capital Area	Sandy Seroskie	President	president@hdi-capitalarea.com	202-895-1258	www.hdi-capitalarea.com
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IL	Bloomington	Central Illini	LaDonna Spragg	President	ladonna.l.spragg@accenture.com	309-657-8711	www.hdiillini.org
IN	Indianapolis	Indiana	Kathi Trimble	VP-Membership	kathi.trimble@bakerd.com	317-237-1276	www.ThinkHDI.com/chapters/indiana
IA	Iowa	Iowa	Rustina Knutzon	VP-Membership	rustina.knutzon@rht.com	515-282-6876	www.ThinkHDI.com/chapters/ihdc
KY	Louisville	Kentuckiana	Mike Mulrooney	President	mike_mulrooney@b-f.com	502-774-7669	www.ksfhdi.org
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MD	Baltimore	Baltimore	Dale Wells	President	dale.wells@laureate-inc.com	410-528-7636	www.hdibaltimore.com
ME	Maine	Northern New England	Roy Atkinson	VP-Membership	roy.atkinson@jax.org	207-288-6665	www.ThinkHDI.com/chapters/nne
MI	Detroit	Motown	Dan Wilson	President	president@hdimotown.com	248-303-5886	www.hdimotown.com
MI	Grand Rapids	West Michigan	Brian VanderZee	VP-Membership	vpmembership@westmihdi.org	616-451-3500	www.westmihdi.org
MN	Minneapolis	Minnesota	Kathy Raph	President	kathleen.raph@usbank.com	615-205-1446	www.hdimn.com
MO	Kansas City	Heartland	Donna Saddler	VP Programs	donna.m.saddler@sprint.com	913-928-4832	www.hdiheartland.org
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NC	Charlotte	Charlotte	David Lando	President	dlando@i-cmg.com	704-348-8170	www.hdicharlotte.org
NC	Raleigh-Durham	Triangle	Eugene Ball	President	eball@helpdesksolutions.com	919-851-6914	www.trihdi.org
NE	Omaha	Nebraska	Dana Olson	President	dolson@creighton.edu	402-280-2946	www.ThinkHDI.com/chapters/nebraska
OH	Cleveland	North Coast	A.J. Sutherland	VP-Membership	sunderlandaj@bfusa.com	330-379-7203	www.ThinkHDI.com/chapters/northcoast
OH	Columbus/Cincinnati	Mid-Ohio	Ron Kibbe	VP-Membership	ronald.kibbe@osumc.edu	614-293-2373	www.mohdi.net
OK	Oklahoma City	Frontier	Patty Killman	President	patty.killman@dvn.com	405-228-8820	www.helpdeskokc.com
OK	Tulsa	Green Country	Chris Thoma	VP Vendor Relations	cthoma@quiktrip.com	918-615-7729	www.ThinkHDI.com/chapters/tulsa
ON	Ottawa	Ottawa	Steve Worth	President	steve.worth@cgi.com	613-740-5900 x5319	www.hdiottawa.com
ON	Toronto	Trillium	Chantal Gallant	VP-Membership	chantalng@rogers.com	416-407-4975	www.hditrillium.com
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TN	Knoxville	Knoxville	Curtis Jones	President	cjones@bushbros.com	865-805-6296	www.knoxvillehdi.com
TN	Nashville	Nashville	Laura Edwards	President	laura.edwards@lifeway	615-458-0661	www.hdimusiccity.com
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TX	Dallas/Ft. Worth	DFW	Douglas Coco	President	president@dfwhdi.org	214-309-3329	www.dfwhdi.org
TX	Houston	Houston	Vikki Jansen	President	jansev1@cpchem.com	832-813-4224	www.helpdeskhoustons.com
TX	San Antonio	San Antonio	Bernard Beaulieu	President	bbeaulieu@beaulieu.com	210-710-4161	www.sanantoniohdi.org
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VA	Richmond/VA Beach	Southern Virginia	Kristin Kupetz	VP-Membership	kkupetz@absnt.com	757-963-7104	www.ThinkHDI.com/chapters/sova
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WI	Green Bay	FOX of HDI	Bob Wery	President	robert.wery@schencksolutions.com	920-996-1145	www.foxhdi.org
WI	Madison	Southern Wisconsin	Erika Oliver	VP-Membership	membership@hdimadison.org	608-204-6440	www.hdimadison.org
WI	Milwaukee	Brew City	Phil Gerbyshak	President	president@profhelpdesk.org	414-298-7445	www.brewcityhdi.com

Developing the Business Case for ITIL®

Learning to speak the language of business and help our executives promote our ITIL initiatives

by **MarkSHELL**

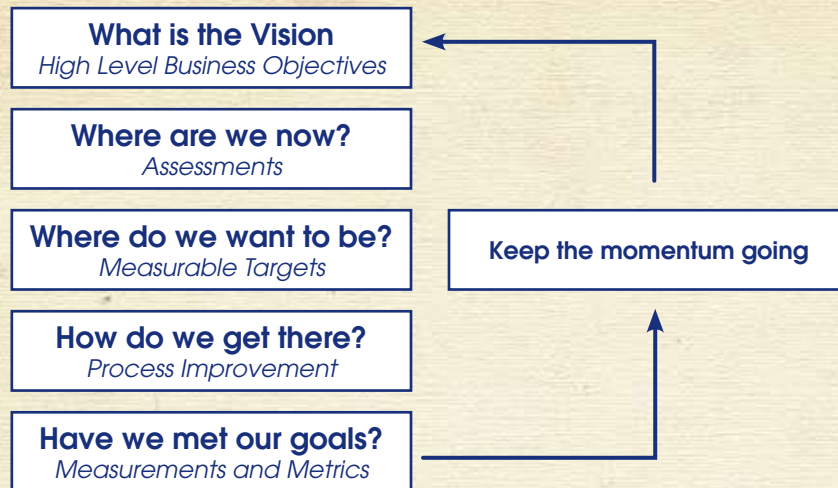
You've been to ITIL® Foundation training. You've read the books. You know implementing ITIL best practices could really help your organization in a number of ways, but you're having trouble getting anyone at the senior management or executive level to pay much attention. How do you explain the value of implementing ITIL to your company's leaders in a way that will have meaning for them and get them to buy into your plan?

Well, first of all, you're not alone. In the fall of 2004, the CIO Executive Council discussed the various professional challenges they faced. One of the professional challenges this group prioritized and determined to tackle was how to clearly explain the value of IT to the enterprise.

Convincing the CFO of the value your ITIL initiative brings to the business may be the biggest challenge you face. It may also be the most important role you play as a leader in IT. Research from Gartner suggests that spending initiatives are largely funded based on the value the initiative is expected to return to the business. While most organizations are not currently developing business cases or performing financial analysis, Forrester Research suggests that lack of a solid connection between spending and return is causing executives to be reluctant to support ITIL-related spending.



Remember the ITIL continuous improvement model you learned about in Foundation class?



ITIL continuous process improvement model

We tend to think of the vision and the objectives in “IT techie” terms. We use terms like, reduce average speed of answer, improve first call resolution rate, or increase the percentage of incidents resolved at tier-1 to describe our high level objectives.

A 2004 Gartner report says, “IT metrics often have no alignment with business metrics.” Identifying and aligning those performance relationships is crucial to demonstrating the IT organization’s contribution to business value.

We need to rethink the way we describe our vision and high-level business objectives for our ITIL initiative. We know that bringing ITIL best practices to our service desk function and incident management process will ultimately improve our first call resolution rate and/or increase the percentage of incidents that are resolved by tier-1 support. The question is, what value does this bring to the business? You’re going to ask for money and other resources to implement the changes necessary to

make these goals a reality but what are you going to promise in return for the investment the business makes in your plan?

Ziff Davis reports that a 2007 analysis of benchmark data from 2,100 companies found that world-class IT organizations, those that achieve peak efficiency and effectiveness, spend 7 percent more per end-user on IT operations than typical companies, but on average, earn that amount back fivefold in lower operational costs.

Think about what that says. We need to stop presenting our plans as simply initiatives to be funded (costs) but as investment opportunities for the business; opportunities that have tremendous potential to pay a return on that investment (ROI). We need to begin to think of, and talk about, the business priority as the most important top or bottom line payoff our initiative is expected to provide. This must be a value that drives the success of the business and should be expressed in terms that matter to

the CEO or board of directors like revenue growth, income growth, protecting future revenues, cost reduction, future cost avoidance, or regulatory compliance.

One way to figure out what is important to your board of directors or CEO is to read your company’s annual report. Get to know the lingo that your CEO is using to describe the business and pick up on that language. It’s likely you’ll come across terms like profit growth, margin, market share, return on capital, cost of goods sold, and earnings per share.

The CEO, CFO, and board of directors at your company are likely to insist on metrics such as ROI and return on capital to justify spending. Return tends to be the driver for all their investment decisions. Why should your project be any different?

Are there real, tangible benefits to be gained by implementing ITIL best practices that we can use to build a business case that shows a return? A 2006 Forrester Research

report cited the following benefits were reported by companies that implemented ITIL:

- 70% said they experienced better quality of delivery from IT operations
- 52% said they experienced better process efficiency in IT operations
- 36% said they experienced better productivity of IT operations
- 19% cited cost savings in IT operations

The benefits are real. We just need to quantify them in terms of return to the business. Imagine putting together a short PowerPoint presentation for your executive management, typically the CFO, COO, or the executive sponsoring the ITIL initiative. You keep it short, allowing fifteen minutes for the presentation and fifteen for questions and answers. Start with an executive overview. What are you trying to accomplish, why, and what are the anticipated benefits? Next, give a project summary. Describe (briefly) what the project entails. For example, *Implement ITIL Incident Management in order to more rapidly restore service to users, thus minimizing disruption to the business, and to increase the number of incidents resolved by tier-1 support, in order to reduce the costs to the business.* Describe how long you anticipate the project taking and give a high-level overview of the resources that will be required. Then, quantify the expected costs followed by the anticipated results (in business terms). It might look something like this:

Three-year cost of investment	\$1.9M
Annual cost savings and/or increased revenue	\$13.2M
Payback period	12.4 months
Net Present Value of three-year savings	\$24.5M
ROI over three-year life of project	351%

Finally, close with a slide outlining your recommendations. "Based on the costs/benefit analysis performed, we recommend moving ahead with the ITIL implementation." Close the sale!

Now you're talking their language. But, how do you do the calculations? It's really not that difficult. You just haven't thought about things in this way before. Let's take a look at payback period, return on investment (ROI), and net present value (NPV) in a bit more detail.

Payback period – The length of time required to recover the cost of an investment. This simply tells the business how long it will be before we get the money back and can use that money for something else.

Costs

Annual Cash Inflows

All other things being equal, the better investment is the one with the shorter payback period. For example, if a project costs \$100,000 and is expected to return \$20,000 annually, the payback period will be \$100,000/ \$20,000, or five years.

There are two main problems with the payback period method:

1. It ignores any benefits that occur after the payback period and, therefore, does not measure profitability
2. It ignores the time value of money

Because of these reasons, other methods of capital budgeting such as net present value, return on investment, internal rate of return, or discounted cash flow are generally preferred.

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Return on investment (ROI) –
A performance measure used to evaluate the efficiency of an investment or to compare the efficiency of a number of different investments. To calculate ROI, the benefit (return) of an investment is divided by the cost of the investment; the result is expressed as a percentage or a ratio.

$$\frac{\text{Gain}}{\text{Cost}} \times 100$$

Return on investment is a very popular metric because of its versatility and simplicity. If an investment does not have a positive ROI, or if there are other opportunities with a higher ROI, then the investment should be not be undertaken.

Net present Value (NPV) –
The difference between the present value of cash inflows and the present value of cash outflows. NPV is used in capital budgeting to analyze the profitability of an investment or project. NPV analysis is sensitive to the reliability of future cash inflows that an investment or project will yield. Be conservative in your estimates.

$$\sum_{T-1}^T \frac{C_t}{(1+r)^t} - C_0$$

NPV compares the value of a dollar today to the value of that same dollar in the future, taking inflation and returns into account. If the NPV of a prospective project is positive, it should be accepted. However, if NPV is negative, the project should

probably be rejected because cash flows will also be negative.

Putting it all together – Let's put some numbers together for our hypothetical example. We said we would *Implement ITIL Incident Management in order to more rapidly restore service to users, thus minimizing disruption to the business, and to increase the number of incidents resolved by tier-1 support, in order to reduce the costs to the business.* Let's work up some numbers assuming we could increase the number of incidents resolved by tier-1 support by even a small amount as a result of implementing ITIL best practices in the area of incident management. What would the financial benefits for the business be?

We'll use the 2007 HDI Practices and Salary Survey for our example data.

Support tier that resolves incident	% of total incidents resolved by each tier	Average salary for each tier	Hourly cost by tier
Tier-1	56%	\$37,195	\$17.88
Tier-2	17%	\$45,425	\$21.84
Tier-3	8%	\$55,211	\$26.54

Let's assume this service desk handles 2,000 incidents a month.

Let's also assume we're not quite performing up to the average levels reported in the HDI survey. Our numbers look more like this.

Support tier that resolves incident	% of total incidents resolved by each tier	Number of incidents resolved by tier (based on 2,000 incidents a month)	Time spent at each tier (you'll need to determine this number for your organization)	Hours spent on resolution by tier (# of incidents x time spent)	Costs for incident resolution by tier (hours spent x hourly cost by tier from table above)
Tier-1	50%	2,000 x 50% = 1,000	½ an hour	1,000 x 0.5 = 500 hrs	\$8,940
Tier-2	20%	2,000 x 20% = 400	3 hours	400 x 3 = 1,200 hrs	26,208
Tier-3	15%	2,000 x 15% = 300	5 hours	300 x 5 = 1,500 hrs	39,810
Total					\$74,958

What would our costs look like if we could just improve to the average levels reported by HDI members in 2007?

Note: We don't make any improvement in the amount of time spent at each tier. We just improve the number of incidents that get solved at lower levels without escalating to higher, more expensive tiers.

Support tier that resolves incident	% of total incidents resolved by each tier	Number of incidents resolved by tier (based on 2,000 incidents a month)	Time spent at each tier (you'll need to determine this number for your organization)	Hours spent on resolution by tier (# of incidents x time spent)	Costs for incident resolution by tier (hours spent x hourly cost by tier from table above)
Tier-1	56%	2,000 x 56% = 1,120	½ an hour	1,120 x 0.5 = 560 hrs	\$10,012
Tier-2	17%	2,000 x 17% = 340	3 hours	340 x 3 = 1,020 hrs	22,276
Tier-3	8%	2,000 x 8% = 160	5 hours	160 x 5 = 800 hrs	21,232
Total					\$53,520

Wow! That's a savings of \$21,438 a month or \$257,256 a year.

But what are the costs – There's one more thing we need to know. What's all this going to cost? Let's assume the following costs. (You'll figure your own actual costs but we'll use these for our example.)

ITIL Foundation training for twenty staff	\$23,600
Consulting guidance	80,000
New or modified reports	10,000
Software modifications to enable the processes we develop	\$90,000
Total costs	203,600

Calculate the financial returns – Now let's use these numbers to calculate our payback period, ROI, and NPV.

Payback period $\frac{\text{Costs}}{\text{Annual Cash Inflows}} =$

$\$203,600 / \$257,256 = 0.79 \text{ years} \times 12 \text{ months/year} = 9.5 \text{ months}$

ROI $\frac{\text{Gain}}{\text{Cost}} \times 100 =$

1 year ROI $(\$257,256 / \$203,600) \times 100 = 126\%$

3 year ROI $((\$257,256 \times 3) / \$203,600) \times 100 = 379\%$

$$NPV = \sum_{T=1}^T \frac{C_t}{(1+r)^t} - C_0 =$$

You don't have to be a math whiz to do this calculation. You're going to use your trusty financial calculator. Check the instruction manual of your calculator to see how to calculate NPV. You'll need several inputs. Here are the values to match our example:

Cash flow 0 or CF₀ – this is your expense in year 1 -203,600
This is usually entered as a negative number to indicate cash going out

Cash flow 1 or CF₁ – this is the net savings or inflow in year 1 257,256

Cash flow 2 or CF₂ – this is the net savings or inflow in year 2 257,256

Cash flow 3 or CF₃ – this is the net savings or inflow in year 3 257,256

Annual interest rate – 10.5%

The interest rate your business can expect to make on another investment of similar risk

When you put these numbers into the calculator, you should get an NPV of \$430,567.80



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This is what you include on your anticipated results slide for your executive presentation:

Three-year cost of investment	\$203,600
Annual cost savings and/or increased revenue	\$257,256
Payback period	9.5 months
Net Present Value of three-year savings	\$430,567
ROI over three-year life of project	379%

So, can you do this for your ITIL initiative? Sure you can! Just gather real data for your organization using the process outlined above. You may want to get some time with your CFO to discuss your numbers. He'll probably be impressed that you're thinking this way and will be more than happy to help you. Good luck!



Mark Shell has developed and managed service and support solutions at several high tech companies that maximize the support organization's performance for over the past twenty-five years. Mark has worked with IT and customer service organizations, in the U.S., Canada, Asia/Pacific, and Europe, implementing processes that are customer focused and designed to maximize customer and employee satisfaction, resulting in high-performing organizations that consistently meet customer expectations and financial goals. Mark works with clients performing process maturity assessments, conducting ITIL training, coaching organizations through the ITIL implementation process, and is currently serving as the coach for HDI's ITIL Implementation Forum. Mark holds a BA in Computer Science/Business, the ITIL v3 Expert Certificate, ITIL v2 Manager Certificate in IT Service Management, ITIL Practitioner's Certificate in IT Service Management—Support and Restore (IPSR), and the itSMF ISO/IEC 20000 Consultant Certificate.



Mark

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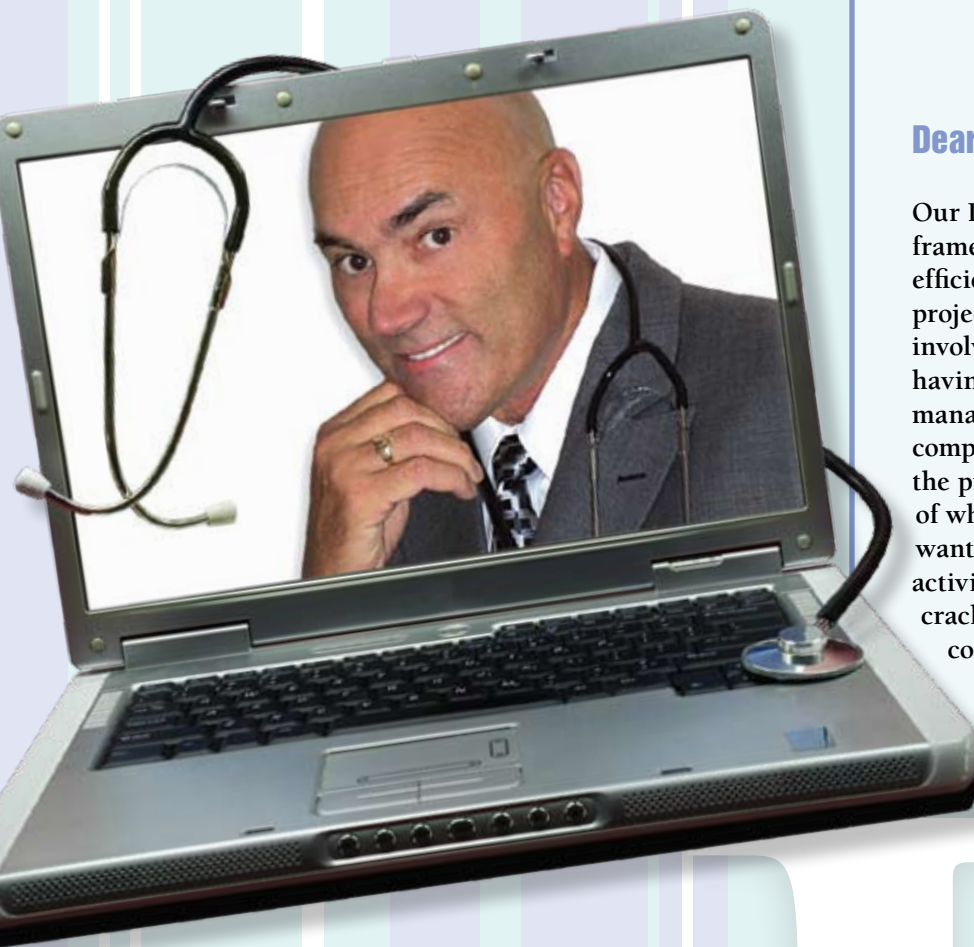
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Dear Dr. Jim,

Our IT department is adopting ITIL® as a framework to become more effective and efficient. We have several implementation projects going on related to that. One that I am involved in is reengineering the service desk and having them adopt the newly designed incident management process. The basic process flow is complete. But we are uncertain about assigning the process activities. We have a general idea of who we need to assign the activities to but want to know how we can be sure none of the activities of the process will fall through the cracks. What can you recommend to get us to continue down the right path?

Implementing in Iowa

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

To submit a question for SupportWorld to Dr. Jim send an e-mail to drjimtheservicedoctor@yahoo.com.

Dr. Jim has also just started a new service desk oriented blog called Dr. Jim's Blog. Reach the blog at: <http://blogs.pinkelephant.com/drjim>. Drop by the blog and make a contribution!

Dear Implementing,

Glad to see you are taking positive steps to increase your effectiveness. This will help improve the delivery of IT services to the business. Especially if you are using a proven framework like ITIL.

Let's begin with the process flow diagram you have created. Using the guidance from ITIL, you have created a diagram (flow chart) showing all the activities/tasks that must be performed for incident management to work. Once you have identified all the tasks, you will now need to write a procedure describing how each task must be done. If necessary, where more detail is required, create step-by-step instructions called "work instructions." Make sure to assign the writing of the procedures and work instructions to competent and experienced writers who also know

how these tasks being documented are performed. Review and edit the documents for completeness and correctness, then you will be ready for the next important step.

To make sure all these activities in the process that you have described and documented are being done properly, you will need to create an "authority matrix." An authority matrix will help you understand all the roles that need to exist in order for the process to be done well. It would be a shame to have a well designed, well documented process that doesn't work because you failed to identify all the roles and relationships that must be in place. Using an authority matrix will help avoid any of these pitfalls.

In ITIL we have embraced the RACI Model as a useful authority matrix. Let's define the word "RACI." It is actually an acronym that stands for:

R – responsible
A – accountable
C – consulted
I – informed

Responsible refers to the correct execution of the process or process activities. The person or people responsible for getting the job done or doing the activity or task.

Accountable refers to ownership of quality, and end result of process or activities. The one person who has the authority for the decision, activity, or process results.

Consulted refers to involvement through input of knowledge and information. In other words, to do this activity or task do I need to consult with anyone to get information that is required to complete this task?

Informed refers to receiving information about process execution and quality. In other words, is there anyone I need to inform when I complete this activity or task?

Below is a graphic example of an authority matrix using the RACI Model.

Roles Process	Process Owner	Process Manager	Support Team #1	Support Team #2	Support Team #3	Support Team #4	Support Team #5	Customer
Activity #1	A	R	R	R	R	R	R	R
Activity #2	A	C	R					C
Activity #3	A	C	R					C/I
Activity #4	A		R					C/I
Activity #5	A	C	R	R	R	R	R	C
Activity #6	A	C	R	R	R	R	R	CI
Activity #7	A		R	C/I	C/I	C/I	C/I	C/I

Here is how it works: First define all the activities (tasks) that must be done in the process. List them in the order they are executed down the left hand column of the matrix. Now you will need to identify each role that is required for each activity. For example, for activity #1 you identify which role is “accountable” for that activity. Then place an “A” in the box below that role. Next identify which role(s) is “responsible” (does the work) for that activity. Then place an “R” in the box below that role. Next identify which role(s) must be “consulted” to obtain required information for activity #1. Put a “C” in each box below that role. Finally, identify which role(s) must be “informed” when this activity is completed. Mark each with an “I” in the box below each of those roles.

Now repeat this for each of the activities.

Some important points for consideration that must be kept in mind are as follows:

- There should only be one role accountable for an activity.
- More than one role may be responsible for executing parts of an activity.
- More than one role may be consulted or informed.
- The “A” will likely remain with the same role throughout the process.
- Be careful to limit “C” and “I” to only those roles that **must** be consulted or informed. It is easy to fall into a trap of assuming that more people need to be consulted or informed than actually are required.

- The role that is accountable can also be responsible for an activity.
- The role that is consulted may also be informed for the same activity.

By utilizing an authority matrix like a RACI Model you are more likely to be able to account for all the roles that are needed for each activity of a process and more likely to prevent an activity from “falling through the cracks” because you failed to fully analyze each activity in your matrix.

Good luck with your incident management implementation.





TEN TRENDS and *Best Practices* for Law Firm Support Centers

The key thing that makes national law firms work is synergy;

The only thing most people know about law firms is from the 1980's television series, *L.A. Law*, the endless jokes we tell about lawyers, and the 2007 film, *Michael Clayton*; none of these portrayals are complimentary. Entertainment and popular culture aside, Mr. Kumble is correct in his observation that a law firm is filled with smart people attempting to do a job and as they attempt to perform these jobs, as they try to work together, IT and technical support become critical to successful Business Information Technology Alignment (BITA). As with any successful collaboration, good BITA is not an accident, it comes from a combination of recognizing emerging trends and successfully managing them with a professional support center.

with the right combination, one and one can make three.

—Steven Kumble



by Robert LAST

In Case You Missed Them—Trends Affecting Law Firms

Practice Management. Teams will be formed across offices that will be greater than the sum of their individual members. “The office environment for practice groups increasingly requires adaptability, open planning, teamwork space,” and collaborative technology.¹

Mergers. Mergers among law firms means collaboration among offices, IT consolidation, integration, and sometimes expansion.

Practice/Office Integration. The “one-firm” concept is not a passing fad and a firm’s staff in Boston is going to be directed, coerced, and otherwise forced to use the same technology, processes, and standards as the staff in Los Angeles to build consistency within the firm/organization. The challenging part of this trend will be to present the value of this approach in a way that all the stakeholders will accept.

Ancillary Businesses. Many law firms are no longer just long law firms, they are lobbying firms, consulting organizations, title insurance companies, and research organizations. Such businesses do not necessarily have to be housed with the lawyers, which means they can work anywhere and will consequently require an IT infrastructure to support their activities.

Staffing and the Next Generation. “By 2020, the projected gap in the skilled workers, versus what the economy needs, will reach 14 million people—and this is on top of a shortfall of 10 million people in the blue-collar workforce. If these projections play out, law firms will have to get serious about working smarter—or face renewed talent wars and even greater job mobility.”²

Records Management. Two big problems in this area: first, law firms are being pulled into their clients’ Sarbanes-Oxley section 404 reviews and are being asked to certify their clients’ compliance. Second, too much paper—the concept of a paperless society has not become widespread; Xerox has reported that the average document—three pages in length—is printed out nine times.³

¹ *Issues & Trends in Law Firm Management, Technology, and Workplace*, A Gensler Publication, p. 3, 2005. URL: http://www.hildebrandt.com/PublicDocs/Doc_ID_2285_5312005955562.pdf Retrieved on July 20, 2008.

² *Ibid.*

³ *Ibid.*, p. 5.

Personal computing. Wireless communication, conference calls, and telepresence systems (<http://www.telepresencereport.com/> and <http://www.telepresenceforum.com/>) are no longer fads and with both Cisco and HP having such systems, their use will grow—and the cost will eventually come down as the cost of transportation increases. Equally important, the post-baby boom generations are the most technology-savvy generations the country has ever produced and their expectations of what tools they will have access to in order to perform their jobs are astronomical.

Communications. “Microsoft is developing technology that will ‘eavesdrop’ on video conferencing to record the imagery, the audio, and facilitate the sharing of documents, recognizing who said what and feeding the data into a knowledge management system. This means that proceedings can flow directly from conferencing to memos, reports, and summaries, without human intervention.”⁴ Sounds good, but you know who is going to have to support such a system? The support center and a legion of security product vendors; it will be interesting to see how the folks at Microsoft will deal with the possibility of “war driving” (<http://www.wardriving.com/doc/Wardriving-HOWTO.txt>) invading a telepresence conference.

Concierge Services. IP-based telephony systems have the potential to allow everyone from the newest employee in a photocopying room to the most senior partner in a firm to dial a single telephone number and speak to a dozen people across the country and the planet, check voicemail, update schedules, and set in motion actions worth millions of dollars. “Wireless can take this further, supporting mobility by directing physical and technology resources to wherever a person happens to be working. Much more of the law firm workplace could then be used on-demand rather than permanently assigned.”⁵

The Future of Support Centers at Law Firms

The future of support centers at law firms will be buffeted by the same trends that are affecting their parent organizations. For support center managers, the concerns of providing excellent service in a timely manner at a reasonable cost will only be amplified as sourcing options continue to change, as changes in the global marketplace and as a new generation of attorneys and support staffs emerge to challenge conventional wisdom, operations and technology. As it often is, the future remains unclear, but law firm support centers, at the very least, can expect to deal with the following trends:

E-mail. Security, ease-of-use and the Federal Rules of Civil Procedure will all conspire to make the importance of e-mail grow to unimaginable levels. “In addition, establishing and communicating a process that minimizes the risks of the disclosure, discovery, or *interception of confidential*

client information when information is sent by e-mail and providing encryption software solutions for extraordinary sensitive information will show that the firm understands how to put in place office management practices to maintain confidentiality.”⁶

Paper. “A recent survey of law firms found that each attorney generates up to 100,000 sheets of paper a year. Assuming a 2,000-hour work year, that’s 50 pages an hour. Almost a sheet a minute.”⁷ Any changes to this environment will inevitably involve IT and IT support; documents on CDs, corporate and firm-wide intranets, password-protected extranets with client-specific documents, and publications and printers set to print double-sided (and the inevitable requests for exceptions). IT will build these systems and the support center will keep them and their users working.

Converting Data. Support centers will begin servicing systems that can convert data from their firm’s system including legacy documents and systems “...into a format that can be readily imported into a client’s IT system.”⁸

Electronic Billing. It must be secure, comply with the appropriate e-billing guidelines, and be workable across multiple platforms. You know who will build it and you know who will keep it running 24/7/365.

Knowledge Management and Expert Systems. “Some law firms have taken years of collective knowledge in a particular practice area or industry and integrated it with document assembly software to provide a kind of expert system. This software allows clients to have routine questions asked and answered without necessarily having to contact an attorney at the law firm.”⁹ And what department will design, implement, expand, and maintain this system?

Final Thoughts on Support Centers

Support centers will certainly have their share of challenges in the years ahead, but they will always be an integral, probably even an intimate part of a law firm’s operation. With the advancement of technology increasingly entwined into the corporate DNA of every law firm; service, support, and exemplary customer service will be the trademarks of best-in-class law firm support centers.



Robert S. Last is the content manager for HDI. If you would like to contact Robert, you can e-mail him at rlast@ThinkHDI.com



Robert

⁴ Op cit.

⁵ Ibid, page 5

⁶ *Corporate Focus*, July 2003, A Publication of LawNet, Inc., 2003, 14. URL: http://www.iltanet.org/files/tbl_s6Publications/PDF33/31/Corporate%20Focus%20White%20Paper.pdf. Retrieved on July 23 2008.

⁷ Alison Grant. “Green-minded law firms seek to reduce paper use,” *The Plain Dealer*, July 28, 2008, sec. A.

⁸ *Corporate Focus*, Op cit, p. 14.

⁹ Ibid, p. 15.

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Help Desk HUMOR

Turn On Monitor to Start Computer?

I work at the help desk for a computer store/service point. One day a semi-computer-literate man called, and asked if we could help with his computer turning off after awhile.

After quite a lot of troubleshooting (overheating, power supply, loose cable, windows, etc.), he brought it over. It worked perfectly on the bench. We send it back, customer calls again. I get the customer to disconnect everything but the keyboard and monitor, and it seems to be working, until the guy calls again a few hours later.

I'm getting seriously irritated now, as there are several other, and less annoying things, I had to do. I decide to drop by. When I get there I open the machine and check every single wire, the power supply, etc. Nothing.

I decide my day is ruined anyways and decide to sit out the inevitable short (at this point I start wondering why this thing still works). Nothing happens. The customer explains that it only happens when he's away. "Hmmm that's odd."

Suddenly, a thought comes to me, to check the power settings. It's simply going to standby. However, it's just set to turn off the monitor after ten minutes.

But to my amazement, after not touching the computer for ten minutes, it does indeed loose power. I give up, and I call a coworker and ask what could be causing this. He laughs and says, "Just check his power strip." and hangs up. So I check the power strip.

After a full seven and half hours of work, I finally figure out the problem. The customer plugged the monitor in the primary slot (with the huge label saying "computer here"). So when Windows turns off the monitor, the standby killer cuts power to the whole strip.

I'm still trying to find out who's the idiot in this story, him for ignoring the full manual, the big cardboard tag, and the icons on the strip itself. Or me, for not realizing people never look at those things, or checking beyond "is the power cord secured properly."

Source: <http://www.techtales.com>

Customer: Hi, this is Celine. I can't get my CD out.

Help desk: Have you tried pushing the button?

Customer: Yes, sure, it's really stuck.

Help desk: That doesn't sound good; I'll make a note.

Customer: No... wait a minute...I hadn't inserted it yet... it's still on my desk. Sorry.

Source: <http://www.Nupathz.com>

Support: And now hit F8.

Customer: It's not working.

Support: What did you do, exactly?

Customer: I hit the F-key eight times as you told me, but nothing's happening.

Source: <http://www.Nupathz.com>

Mastering the Difference between Leadership and Management

It is a common belief that management and leadership are the same role. While it is common that a manager also plays the part of the leader, these two roles are truly separate in function and in the way they add to the success of an organization. By understanding the difference between management and leadership you will become more effective in helping others see the road ahead.

To understand the difference between management and leadership, consider the construction of a new road. To build that road there are workers, machinery, and tools which are all vital in the road's construction. Managers help ensure those workers, machinery, and tools work together in the most efficient way possible. A manager makes sure those workers are well-trained, motivated, rested, and that they know what they're supposed to do next. The manager does the same thing with the tools and the machinery to make sure that they're working correctly and that the workers are able to use them efficiently and safely. This is the role of management. On the other hand, a leader makes sure that the road is going in the right direction before the construction begins. That leader also monitors conditions in new situations to ensure that the road under construction is still the correct one and is still going in the right direction.

How does this affect you as a leader? Are you spending your time managing people when you should be making sure that the road ahead is the one that you want to be on? To expect to be an effective leader you must present a clear vision and a trail you are willing to walk on first. While there are times when it is appropriate for a leader to fill a management role, it is vital to understand the difference between leadership and management so you can be effective no matter which role you happen to be filling at a given time. If you are a leader overseeing managers, it is important that you provide them with the correct perspective so they may be effective in their management role. Don't manage the managers. Lead them.

If you are not in a formal leadership role, it is also important that you understand that when a leadership opportunity arises there is a difference between being a leader and managing the effort. Even if you end up filling both sets of shoes it's important to understand the difference in roles in order to fill them effectively. If, on the other hand, you learn how to lead by showing people that you are walking down the right road, you will become a natural leader and will be able to help many others find success as you achieve your own.

Learn more about effective leadership by reading *12 Winning Leadership Qualities: Unleash the Leader Instinct Within You* at www.unleashtheliderwithinyou.com.

“How do you turn off a virus that keeps saying ‘Network 100% assimilated?’”



BUSINESS CONTINUITY and the

Lynda C. Martel

Director of Marketing, DriveSavers Data Recovery, Inc.

Businesses today rely on technology more than ever. An unexpected disaster is capable of disrupting the functionality of the business, ranging anywhere from a short power outage to damage to the physical IT infrastructure caused from a tornado or hurricane. Crucial to any loss of technology function in the business is the service desk. While most IT departments have in place a disaster recovery plan, to be effective the service desk must be prepared and understand the steps necessary to ensure business continuity. People, process, and technology must be addressed in the plan to maintain functionality in the event of a disaster.

A good DR plan (*incorporating ITIL® and IT service continuity management*) can help IT and the service desk plan ahead for that worst case scenario. What are the top three most important factors to consider when preparing an IT service organization for a disaster?

Thinking Beyond the Backup to Avoid Critical Data Loss

As part of their disaster recovery plan, IT departments in small and large businesses rely on either an external hard drive or a RAID (Redundant Array of Independent Disks) to backup their critical data. What happens when the backup system fails? And, it will!

Today's IT managers must think beyond the backup when developing a business continuity plan. Here are some tips from a professional data recovery company on how to minimize the consequences of a failed backup system and prevent permanent data loss.

- Don't issue rebuild commands after data loss. This could overwrite the data set on the RAID controller, which tells it how to view the drive array, making it more difficult (or impossible) to find and restore lost files.
- Don't run repair utilities on a failed drive. Utilities can change the original data, destroying opportunities to retrieve it with another recovery technique.
- Don't reinitialize or format the volume. The process could overwrite the catalog, pointers to the data, and erase the data.
- Don't restore from backups to the affected drive. If the backup doesn't hold the data you think it holds, you run the risk of overwriting it with the wrong data.
- Don't remove the drives from a failed RAID system. Preserving the original order of the RAID array reduces the chance of overwriting critical data by mistake. If you must remove the drives, carefully label their sequence before doing so.

Service Desk

Chandra Callicutt
Senior Product Manager, *TechExcel, Inc.*

The top three most important factors to consider when preparing for a disaster are data, security, and people.

Data: It is important to identify where all crucial data files are located and then document the backup process. Conducting occasional checks of the archived data through restoration is an IT industry best practice. Off-site storage of data backups should be an absolute requirement. Also, the retrieval process for archived data should be well-documented. Getting the data and restoring it in a timely manner should be of utmost importance.

Security: Everything from the physical building security to server and data center security to independent workstation and laptop security should all be considered. Critical technology assets such as servers, firewalls, switches, etc., need to be secured and accessible by at least two employees. Workstations and laptops should be set to auto-lock and require a password entry before loading the operating system. Further, laptops can be protected using a Trusted Platform Module (TPM). A TPM is a secure micro-controller with added cryptographic functionalities. It works with supporting software and firmware to prevent unauthorized access to a notebook computer.

People: Creating a chain of command that is both easy to understand and widely published is crucial. Every employee should know who to call and where to go if and when a disaster occurs. Establishing a calling “tree” is a terrific way to get and keep everyone informed.



Matt French
Director of Marketing, *Service-now.com*

Unfortunately, natural disasters, security breaches, and rolling black outs are a reality that must be considered and planned for in today’s IT environment. An organization’s reputation, market value, employee safety, and compliance may be at risk.

Maybe these examples are extreme, but the underlying issue is not. In the event of a loss of a critical IT service or asset, regardless of the reason, is the service desk prepared? Threats to business continuity must be assessed by the business to determine priority and appropriate response.

A prepared IT service organization will have a plan in place that includes:

- Individuals and groups assigned to specific configuration items and services.
- Essential processes aligned with the organization and supported by the technology. For example, change, SLA, and business service management monitoring, management, and alerting are all critical processes and technologies.
- Service desk technology that is scalable, redundant, and flexible enough to effectively support disaster recovery. The service desk should be the frontline communications vehicle and its availability is essential.

ITIL-defined risk management requires risk monitoring processes supported by reliable and up-to-date risk data. Organizations should consider an IT service desk solution that is hosted off premise. New on-demand, software-as-a-service technology that is hosted in an off-premise data center can provide an added level of confidence in a service desk.

The IT organization should play a key role in supporting business continuity. Process and technology should be ready for the worst and, ultimately, the people will pull the business out of disaster.

IT First Aid

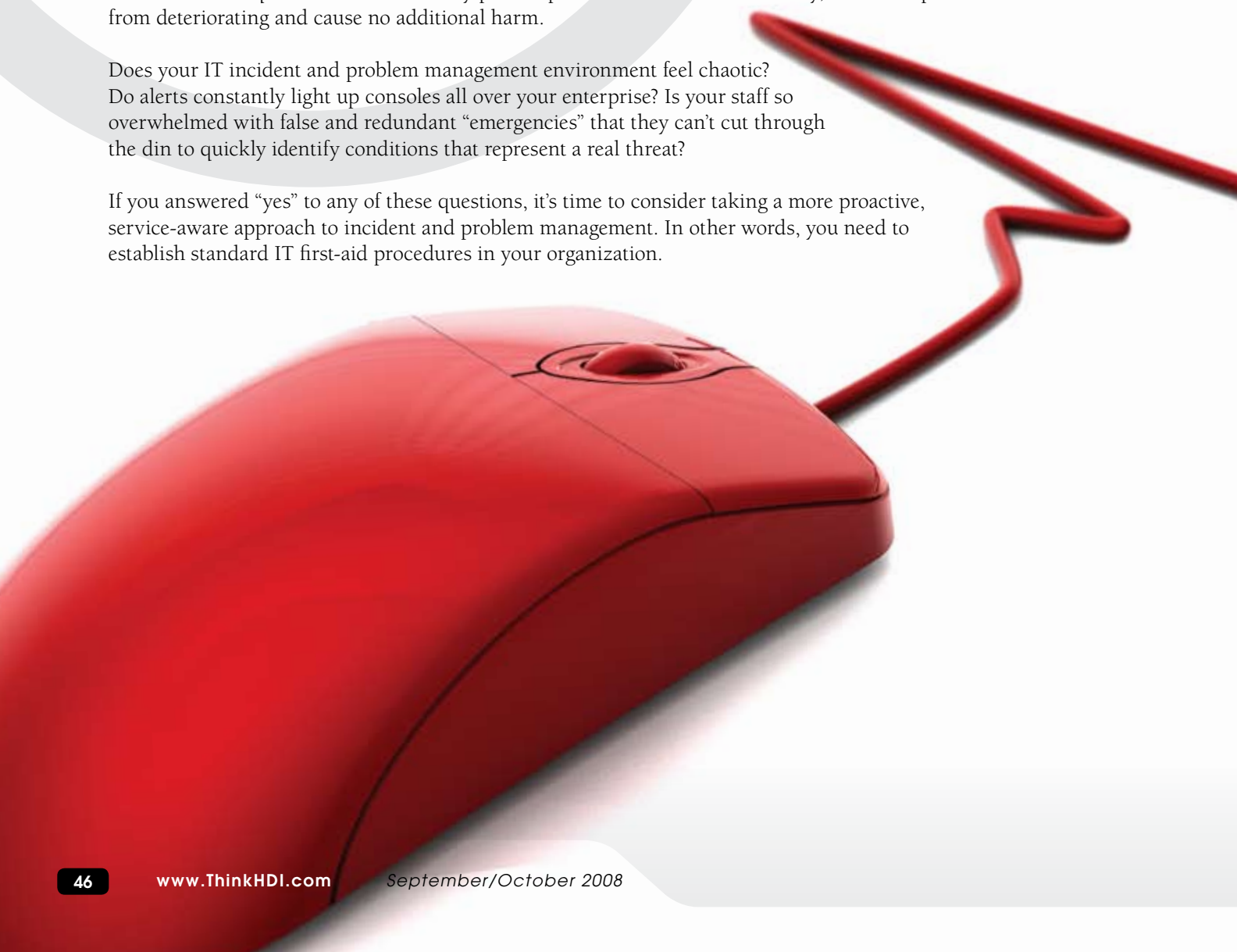
by MaryNUGENT

If you have ever taken a first aid course, you probably learned the basic procedures to follow in any emergency. These potentially life-saving steps include assessing the situation: Does the environment present imminent dangers to you and the injured person? What helpful information, if any, can be gathered from the person? How serious is the injury? Does the person need an ambulance, or is a bandage all that is needed? If the injury is left untreated or is treated improperly, what will be the effects? Will the injury worsen or endanger other life functions? What immediate remedies should be applied, and what can wait until later? What follow-up treatments should be administered?

Standard first-aid procedures provide a *framework for action* amid the chaos of an emergency situation, where multiple distractions and demands for the responder's attention exist. They allow the responder to cut through the noise and make quick decisions that may put the patient on the road to recovery, or at least prevent the condition from deteriorating and cause no additional harm.

Does your IT incident and problem management environment feel chaotic? Do alerts constantly light up consoles all over your enterprise? Is your staff so overwhelmed with false and redundant “emergencies” that they can't cut through the din to quickly identify conditions that represent a real threat?

If you answered “yes” to any of these questions, it's time to consider taking a more proactive, service-aware approach to incident and problem management. In other words, you need to establish standard IT first-aid procedures in your organization.



“ IT’S TIME TO CONSIDER TAKING A MORE PROACTIVE,
SERVICE-AWARE APPROACH TO INCIDENT AND
PROBLEM MANAGEMENT. ”

When armed with the right information, your IT staff can provide better service. Operators are notified of exceptions and can take action before their service has a chance to degrade. Service desk agents receive intelligent incident tickets that indicate business impact and priority. The entire staff works together cohesively, efficiently, and effectively, using proven best-practice service delivery and support processes.

The Four Stages of the Problem Lifecycle

Proactive, service-aware incident and problem management aligns directly with IT Infrastructure Library (ITIL®) guidelines for addressing all four stages of the problem lifecycle: detect, diagnose, isolate, and correct.

The first stage is one of **detection**, of answering, “What is the problem?” ITIL calls this the “Problem Identification and Recording” stage. To address it effortlessly, your incident and problem management solutions must work together to provide monitoring, alert notification, reporting, and historical trending for all your infrastructure resources—from servers, storage, and network devices to operating systems, applications, and databases. They should be versatile enough to provide domain-specific views, alerts, and probable-cause analysis—for example, for servers—as well as to display an infrastructure-wide status for end-to-end application

performance. Your solutions should also keep tabs on capacity and provide early warnings of potential capacity issues.

In addition, the solutions should offer a top-down approach that lets you see the application as your users see it. Real-time transaction monitoring measures the availability, performance, and accuracy of transactions while users are performing them. Synthetic transactions run at regular intervals to measure availability and performance of application services.

A cost-effective solution maintains thresholds for everything you want monitored. When unusual patterns develop, these systems allow you to notify the appropriate people so they can take action before application performance suffers and users are affected.

With a service-centric approach, you can also track service delivery against the service level agreements (SLAs) you have established with business users. Service-aware solutions help you to detect when a particular SLA is in danger of being missed and notify the right people. This early warning speeds response and enables corrective action before the SLA is missed. Effective solutions also measure the business impact of SLA compliance achievements or breaches, helping you manage services on the basis of their value to the business.

Such an approach puts you ahead of the game by leveraging strong analytics capabilities to:

- ⊕ Automatically initiate corrective actions wherever possible
- ⊕ Consolidate related events and eliminate redundant alarms, creating specific actionable events that IT personnel can act upon
- ⊕ Notify the right people of a potential problem so they can resolve it before it affects users
- ⊕ Deliver comprehensive, actionable events with business priority and service impact

The second stage is where you **diagnose** the problem, and ITIL calls this stage “Problem Classification.” To handle this stage effectively, establish a band of normal operation for your environment, and then watch for variations from the norm. When an abnormal condition develops, analyze and correlate information to filter out irrelevant and false alarms. Effective solutions are ones that turn this raw data into actionable information that reduces complexity and shortens time to resolution. Simply put, they eliminate event storms that might overwhelm operators and slash the number of events and tickets an operator or service desk agent needs to handle.

Most important, analyze and present the influence of outages and performance degradation on critical services. Provide your IT staff with insight into how the business processes depending on those services will be affected. A real-time capability assesses incoming infrastructure events against a service impact model and determines the scope of the impact. The model assigns priorities on the basis of service impact and business policies. It also tracks in real-time whether service compliance is improving or declining, which becomes extremely handy when every second of performance degradation has a dollar value associated with it.

The bottom line is that your staff has plenty of time to respond before an easy-to-fix condition in a critical system develops into a major problem with serious business impact. Moreover, everyone has actionable information to speed their efforts at correcting the right problem earlier in the cycle.

IT resolves application problems in the ITIL “Problem Investigation and Diagnosis” third stage, which is where you **isolate** the cause of the problem. To reduce resolution time, you need solutions that deliver intelligent, actionable events to the operations staff and intelligent incident tickets to the service desk.

Effective solutions ensure that each event or ticket contains a link to a ranked list of the most probable causes of the associated problem. Moreover, they determine the criticality of the business services affected by the events and assign priorities accordingly. As a result, the staff knows which events and tickets to address first.

The solutions allow technical staff to easily drill down into the data for more detailed diagnostic information and to launch diagnostic programs directly from the operations or service desk console. This capability enables operations and the service desk to zero in on the causes of issues more quickly.

Finally, for the ITIL “Request for Change and Problem Resolution and Closure” stage, solutions should provide separate and distinct workflows that are optimized to **correct** the problem. These workflows should encompass root cause analysis for problem control, known error management for error control, and knowledge solution management for trend identification and future problem prevention.

Advancing Service Management Maturity

Proactive, service-aware incident and problem management is a major step up on the service management maturity ladder. It leverages analytics to help you further integrate the goals of IT with the goals of the business.

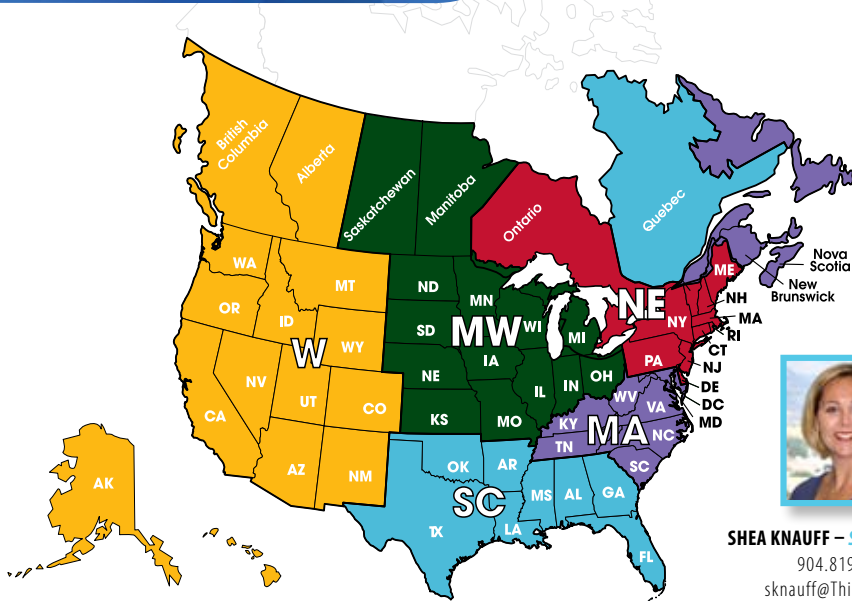
The payoff is substantial. By establishing these “IT first-aid” procedures, you can cut through the chaos, so your staff isn’t bombarded with huge volumes of events and tickets. This technology takes care of many events automatically to reduce the need for human intervention. “It correlates events and presents related events together, in a way that makes business sense. Moreover, it provides rich, actionable information that helps your staff understand what is happening in the IT infrastructure, quickly identify impending problems, and take the right action every time.



Mary Nugent, Vice President, Service Assurance, BMC Software, is an accomplished software technology executive with extensive expertise and in-depth knowledge in the emerging service management marketplace. She manages BMC’s customer-facing efforts for the company’s Service Assurance portfolio, including infrastructure management, event and impact management, and capacity management products. Prior to joining BMC Software, she was the director of business development for a start-up, ISV Logistic Solutions, and also worked as an independent consultant for companies deploying mission-critical client-server technologies. In addition to her fifteen years of technology experience, she also has ten years of experience in public accounting and is a Certified Public Accountant.



Mary



STEVE KANDRACH – NORTHEAST
719.268.0339
skandrach@ThinkHDI.com



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



SHEA KNAUFF – SOUTH CENTRAL
904.819.6647
sknauff@ThinkHDI.com



VICTORIA BECH – WEST
719.785.5354
vbech@ThinkHDI.com



MARK EWELL – MIDWEST
719.268.0328
mewell@ThinkHDI.com

September/October/November Course Schedule

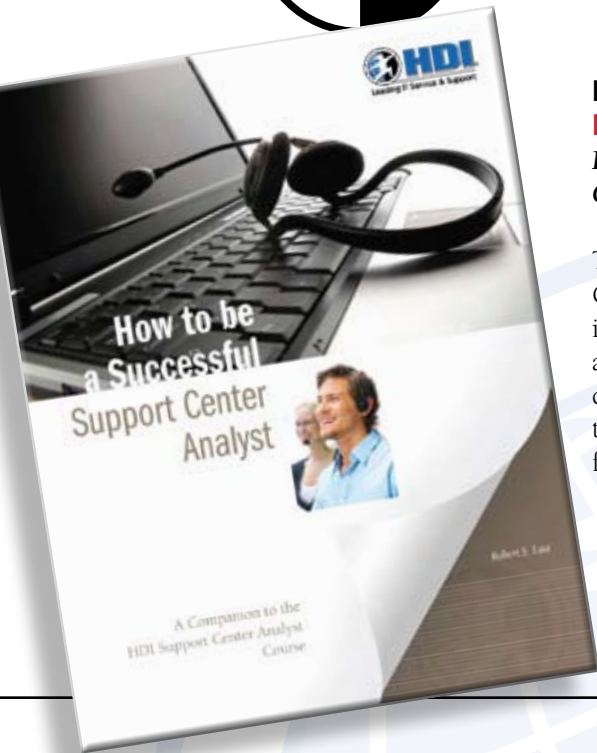
COURSE	SEPTEMBER	OCTOBER	NOVEMBER
HDI Desktop Support Technician		2-3 New York, NY	
HDI Support Center Analyst	8-9 Grand Rapids, MI • Los Angeles, CA 15-16 Austin, TX • Washington, D.C. 24-25 Greenville, SC 29-30 Boston, MA • Detroit, MI	6-7 Denver, CO • Hunt Valley, MD • Milwaukee, WI 20-21 Atlanta, GA 27-28 Chicago, IL	6-7 Indianapolis, IN • Seattle, WA 10-11 Dallas, TX • Irvine, CA 17-18 New York, NY • Washington, D.C.
HDI Support Center Team Lead	22-23 Irvine, CA • New York, NY	20-21 Atlanta, GA 27-28 Chicago, IL	10-11 Dallas, TX
HDI Support Center Manager	8-10 Savannah, GA 10-12 Los Angeles, CA 17-19 Austin, TX • Washington, D.C.	1-3 Boston, MA • Detroit, MI 8-10 Hunt Valley, MD 21-23 Washington, D.C. 22-24 Atlanta, GA 29-31 Chicago, IL	12-14 Dallas, TX • Irvine, CA 19-21 New York, NY • Washington, D.C.
HDI Support Center Director	9-11 Chicago, IL		18-20 Arlington, VA
Knowledge Management Foundations: KCSSM Principles	17-19 Washington, D.C.	29-31 Chicago, IL	19-21 New York, NY
ITIL[®] v3 Foundation	24-26 Irvine, CA • New York, NY	22-24 Atlanta, GA 27-29 Denver, CO	

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COMMUNITY *News*



NEW!

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This book can be purchased as part of a bundle which includes one HDI Support Center Analyst Certification Voucher. For more information, visit the HDI eStore at www.ThinkHDI.com/estore.

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HDI is planning another great week of SPIN webinars during the week of October 6-10, 2008 to celebrate Customer Service Week. Last year over 2,500 people participated. This year we have another great line-up, with have five fabulous speakers, five different themes, and fun, fun, fun!



Bring your troops together daily to view a webinar and motivate the entire team while improving morale and showing you appreciate the customer service they deliver to their customers. If you are looking for ways to celebrate with your team, visit the HDI Web site. Find details for ways you can recognize your team, have fun, and celebrate Customer Service Week!



2007 YouTube video campaign on the HDI Guy channel.





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