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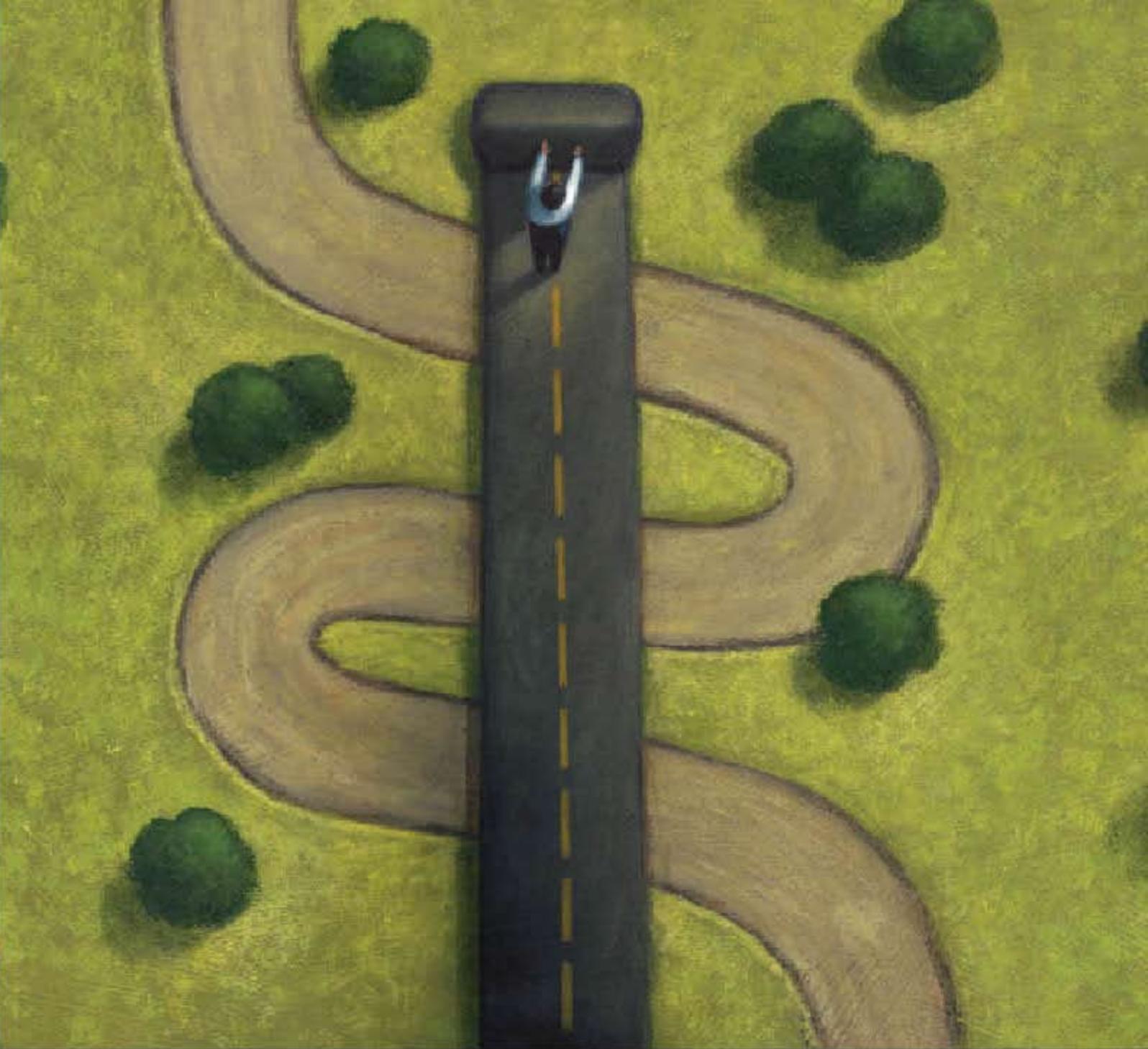
Technician resolves incident



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Letter From the Editor



SupportWorld Readers,

HDI recently hosted its Local Chapter Summit in Colorado Springs. The summit, held annually, brings together local chapter officers from across the U.S. and Canada to network, enhance their leadership skills, and share and receive awards. HDI's local chapter officers are an integral part of our organization and are the lifeblood of our local chapter community. It is an exciting event and a joy to see many of our core members, volunteers, and supporters gather together and develop strategies to build an even stronger foundation for HDI and its membership. Thanks to all of you that attended and best of luck to you in the coming year.

While we are still gleaning useful information from our *2008 Practices and Salary Survey*, we are gathering data from our membership for our 2009 survey. The *Practices and Salary Survey* benchmarks IT support center data such as first-call resolution rates, cost-per-incident, and regional salaries. You can contribute by visiting the HDI Web site via the Resources/Industry Reports tabs. Inside this issue, Robert Last, HDI's Content Manager, takes an in-depth look at First Call Resolution Rate metrics from data within our *2008 Practices and Salary Survey* and discusses the question, "What percentage of incidents taken over the phone are resolved on the first call?"

With more complex systems, integration to the business, ROI expectancies, and the role technology plays in processes in today's businesses; metrics remain quintessential to the management of our support centers. To add to this (unfortunately), senior management still has a tendency to "live or die" by the numbers. What issues are service desk managers today faced with when managing all these numbers? In the feature article, *The Service Desk Balancing Act*, Jim Murphy discusses three sets of service level metrics related to the performance of an actual help desk and provides insight into the issues faced by service desk managers. "Keeping an eye on how effective and efficient the service is performing is critical because the perception of how well IT is performing is often influenced by how well the service desk performs." —Jim Murphy

HDI continues to look for ways to serve you better and bring you the most informative, engaging content in the industry. If you have a story or an article to share, please e-mail me at jneider@ThinkHDI.com.

Best Regards,

Julie Neider

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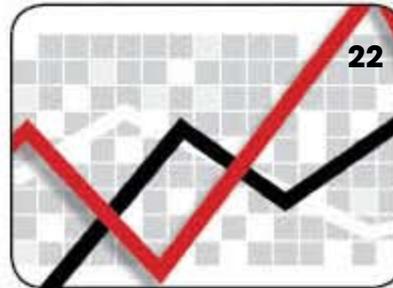
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THE MEANING AND SIGNIFICANCE:

First Call Resolution Rate

A Closer Look at the 2008 Practices & Salary Survey Results

by Robert LAST

While the 2009 *HDI Practices & Salary Survey* is being considered by the HDI membership now, the 2008 survey is still a rich source of data and trends. In this article, I'll discuss the findings related to the survey question, "What percentage of incidents taken over the phone are **resolved** on the first call?" The results of this question are presented below:

	Number of Responses	First Call Resolution	Target First Call Resolution	% Who Make Target
The incident is resolved by the person who receives the call	437	62.6%	69.6%	42
The incident is resolved without hierarchical escalation (transferring at the same level is still first call)	200	60.3%	66.9%	38
The incident is resolved by any level as long as it is resolved on the initial call	229	59.4%	66.5%	41
The ticket is closed within X minutes of being opened	78	58.3%	61.7%	56

The concept of first call resolution rate has its origins in the 1970s with the creation of the first inbound call centers where the complexity of a customer service transaction was confined to the tasks related to airline reservations, credit card bill questions, and complaints about street lights. Fast forward almost forty years and call centers and support centers are as ubiquitous as ATM machines, cell phones, and television and radio commercials.

Because of their ubiquity and the increasingly complex range of IT products and services that drive our global economy, there has also been an expansion in how First Call Resolution Rate is defined. As the table above shows (437 of the total responses), the dominant definition of First Call Resolution remains: **"The incident is resolved by the person who receives the call."** In the vernacular of day-to-day office operations, this definition is frequently shortened to a "one and done" call. More importantly, the FCR Rate is 62.8% with a target rate of 69.6%; for you math demons, only 42% of survey respondents are meeting their target FCRR. **From the perspective of customer service and support center operations, this is not a statistic to cheer about and suggests weaknesses in knowledge management practices, problem solving, and troubleshooting protocols and root cause analysis.**

The next most common definition of FCRR is, “**The incident is resolved without hierarchical escalation (transferring at the same level is still first call).**” Besides the fact that the concept of hierarchical escalation is a candidate for coverage under the Endangered Species Act, the FCRR for this definition is 60.3% with a target FCR Rate of 66.9%; only 38% of respondents met their target. Adding complexity to the definition of FCRR does not seem to have a positive impact on performance.

The third most often used definition of FCRR is “**The incident is resolved by any level as long as it is resolved on the initial call.**” Respondents using this definition had a FCRR of 59.4% and a target rate of 66.5%; there was a slight increase in the percentage of respondents that met their target from 38% to 41%. Good news indeed as anytime a KPI related to customer satisfaction goes up, it reflects well on the support operation and is a benefit to the customer.

The final definition of FCRR used in the *Practices & Salary Survey* is “**The ticket is closed within X minutes of being opened.**” In this definition, the respondents reported a FCRR of 58.3% and with a target resolution rate of 61.7%; 56% of the respondents reported meeting their targets.

The diversity of definitions for First Call Resolution Rate is a reflection of the complexity of the IT world. More importantly, however, are the trends that the *Practices & Salary Survey* identifies:

-  The highest percentage of incidents resolved over the phone on the first call is 62.6%—not a particularly impressive number; the lowest rate was 58.3%.
-  The highest Target First Call Resolution was 69.6%, the lowest 61.7%, 69.6% is close to being respectful, but 61.7% is not.
-  Most concerning to all support professionals, however, are the very low numbers in the category “Percentage Who Make Target.” The highest rate was only 56% and the lowest was 41%, neither numbers that are going to win any prizes or accolades from customers or users.

In the final analysis, incidents resolved on the first call are an indication of the health, wellness, effectiveness, and activities of a support operation. FCRR is a dynamic

measurement meaning that it should change as products, services, and customers change. In addition, FCRR should **always** be considered in the **context** of what is being supported; more complex products will generally produce lower first resolved calls than something easy and commonplace such as password resets. Inevitably, the number of resolved first calls will also vary from one industry to another; for example, the number of first resolved calls at the Cleveland Clinic will be different than those of the Geneva, Ohio public school system.

Generally, however, over time and with good analysis of “routine problems and questions,” a support center will show a rising FCRR for some categories, but it is also common for many support centers to experience a **lower** rate of first resolved calls when a new product or service appears on the support stage. It can take a support center a period of time to accumulate the data, experience, and knowledge necessary to successfully and quickly solve new product questions and problems.

While professionals can debate the definitions of FCRR, the most important characteristic to remember about this KPI is that no customer ever complained about having their problem solved or their question answered quickly in a “reasonable” amount of time. It is never a bad idea to think about the customer’s perspective when evaluating the characteristics of resolved calls and the best support managers are the ones that spend the time to understand their resolved calls.



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 recently published 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



BALANCE

The Service Desk

MANAGING

Act

by James MURPHY

Managing a service desk is a balancing act. Keeping an eye on how effective and efficient the service is performing is critical because the perception of how well IT is performing is often influenced by how well the service desk performs. This article will examine three sets of service level metrics related to the performance of an actual help desk and provide insight to the issues faced by service desk managers.

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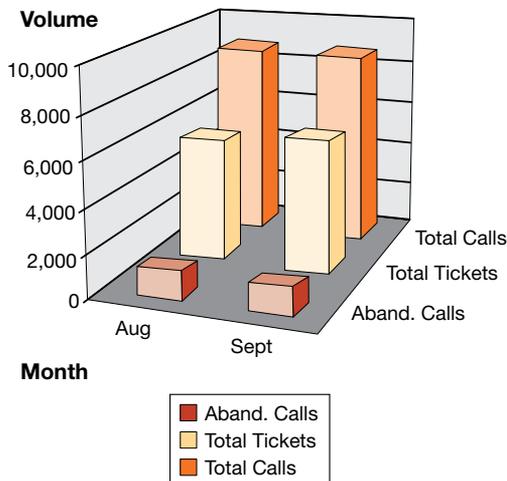
METRIC SET #1

CALL VOLUME (INCLUDING CALLS ABANDONED)
VS. TICKET VOLUME

One common issue faced by service desks is that customers cannot get through to a representative for assistance. They call the service desk phone number and then wait in queue for an unreasonable period of time. The caller gets disgusted, hangs up, and/or calls a support person or IT contact directly. This action represents an “abandoned call.” Many of the phone systems used by service desks will keep records of the number of abandoned calls. These statistics are useful to collect and report as one measure of the effectiveness of a help desk. It is also important to measure the call abandoned rate to provide a “before/after” snapshot of the effectiveness of a service desk implementation.

Success may mean that the abandoned call rate is reduced to a very low level, say 2 percent versus the current levels. The abandoned call rate, total number of phone calls made by the service desk (in and out), and the total number of tickets opened by the service desk for a specified period of time can be assembled into a slide that effectively communicates the current state of the service desk.

Phone Calls VS Tickets



The graph above shows that on-average there are around 4500-5000 tickets/month. There are a little over 8000 calls made per month. These calls can be broken down further into incoming and outgoing calls. The incoming calls would be used against the abandoned call rate to calculate the percentage of incoming calls abandoned. In our sample data, the incoming calls were 4289 and 4305 for Aug. and Sept. The number of calls abandoned were 1002 and 858 respectively. That puts our average abandoned call rate in the neighborhood of 21 percent—indicating that there is a problem for the help desk staff preventing them from answering the calls effectively. The issue faced by help desk management is clearly summarized in this one slide. The opportunity to reduce the abandoned call rate and improve the communication flow through improved processes is also apparent.

One key to reducing abandoned call rate issues is to reduce dependency on the telephone. As calls come into the help desk, representatives should integrate with back office support using instant messenger and e-mail in real time. If the help desk representative needs to assign a ticket to a support team, the process should occur automatically; the representative should not have to use the telephone to manually escalate tickets to support teams. Also, when tickets that are escalated to support teams are completed, communication back to the customer can be automated.

He/She can be informed that the call has been resolved and can be instructed to contact the help desk if the problem persists. Each point in the process where human interaction is required is an opportunity to leverage automation. The people responsible for providing the service desk service have to decide on the appropriateness of automation for each step. The goal is to keep the phones available for incoming calls and reduce the outgoing calls used to contact support staff.

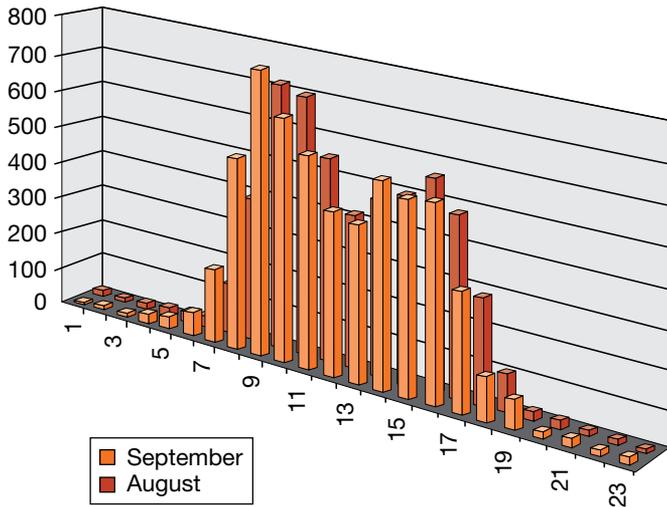
SERVICE METRIC #2

NUMBER OF TICKETS OPENED PER TIME PERIOD

Many help desk staffs will complain that they are overworked, and “stressed out.” They will often be requesting additional staff to man the phones to help take calls. Help desk management is usually aware of the problem, but want to understand how pressing the need really is. Additional staffing will impact the organization’s bottom line pretty quickly, and senior management will expect a lot of detailed justification. Help desk management may ask you if the additional staff is really needed.

Using metrics from the help desk software, you can prepare a chart showing tickets opened per hour. This information provides insight into the ticket throughput for the service desk, and can be used to estimate the number of tickets each representative has to process on average in any given hour. Knowing the effective throughput rate for processing calls can also help to adjust the triage processes used for incoming calls. The automation discussion from the abandoned call rate graph also applies here, but so do some additional elements. For example, after examining several help desk implementations, we found that representative training and incentives for first call closure also impact the help desk’s ticket throughput. Written instructions and processes for triage and service call resolution must be followed consistently by all help desk representatives. Incentives for service desk personnel have to be carefully thought out and balanced with the skill set of the people taking the calls. Too little skill and the first time resolved rate is too low, too much skill and the representatives will try to own the tickets for too long trying to demonstrate their prowess at problem resolution.

Rewarding service desk employees for first time call resolves can be detrimental to the service desk team’s ability to effectively process calls in a timely manner—especially when available resources are taxed by incoming call volume. If the strategy to resolve every call the first time is the only strategy, you run the risk of backing up the call queues during peak hours.



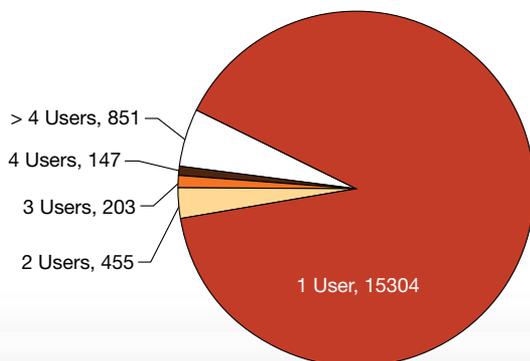
In the graph above we have broken down the calls to a sample help desk center for August and September by hour of the day. Note that this chart shows that there are definite “peak reporting periods” in the 24-hour cycle. One way to address this issue is to have a process that adjusts for call peaks. The process may involve integrating back office support personnel into the service call resolution process. Support teams are obligated to have personnel by the phones during peak hours for fast escalation, and extra resources to handle incoming service calls.

SERVICE METRIC #3 IMPACTED USERS BY CALL

Assessing the impact and urgency of service calls is part of an effective “triage” process which should be performed for every incoming service call. A primary function of the service desk is to provide communication and resolution for incidents that impact multiple users. One-on-one help from a service desk technician is the most expensive help that can be provided.

The graph below shows the impacted users by service call for incoming tickets during the August and September timeframe. In our example, 89 percent of the calls that came in were for a single individual.

Impacted Users per Call



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Similarly, upon reviewing data from several service desks we found that much of the one-on-one support for incoming calls was for password resets.

In both of these examples, opportunities exist to automate the service desk to provide self-help. If the greatest percentages of calls are for password resets, then the greatest opportunity for reducing the one-on-one help rate is to automate password resets. Companies also integrate searchable knowledge bases and Frequently Asked Question lists for common questions. Automating the receipt of service calls can also help reduce the time spent one-on-one. Some service desk implementations are even allowing customers to self-triage their service calls so that interaction with

service desk personnel is bypassed, and the tickets go directly to second level engineers.

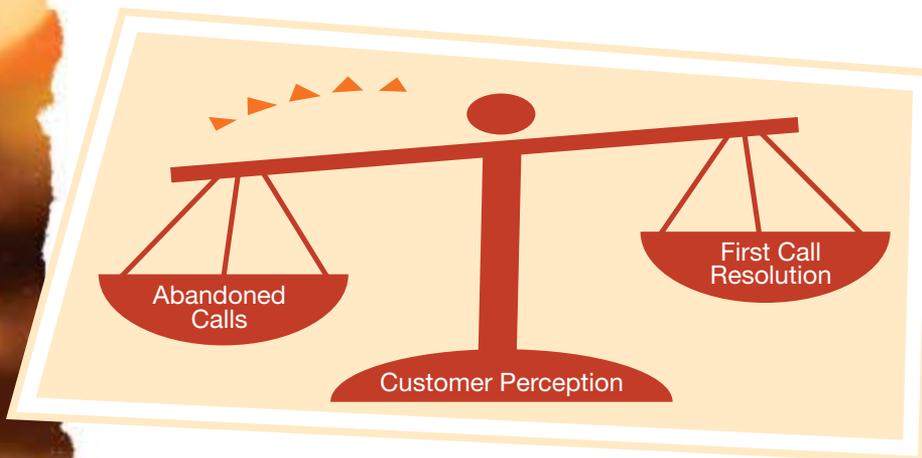
We have examined three analyses of service desk data. In each case we were able to relate metrics extracted from the service desk as key performance indicators for measuring the impact of the changes proposed. When implementing a new service desk or changing the processes that govern how services are utilized it is a good idea to take a sample of the data before and then after the changes are put into effect.

The unit cost of the ticket can make an excellent metric for estimating the ROI of some of the proposed solutions. The following discussion will explain how to

utilize the service desk ticket as a unit for estimating ROI: Take the annual budget of the service desk and divide it by the number of tickets processed. The result is a dollar cost/service call. This figure can then be applied to the estimated reduction in the number of tickets opened at the service desk for any particular new project to give a simple calculation for the value of the savings to the company.

The diagram below summarizes the recommendations and findings based upon the data reviewed in this article. Evaluating and adapting these best practices is up to the service desk implementation team and your specific business requirements.

Keys to Implementation Success



- Leverage Automation (Pagers, E-mail, Cell Phones, etc.) to:
 - Meet Service Level Agreements
 - Keep service desk available
 - Communicate with back office support groups
 - Keep customer informed of resolution progress
 - Inform customer of resolution
- Align service desk skills with responsibilities.
(Over-skilled workers tend to try and resolve everything).
- Have detailed work instructions
- Adapt call processing approach based on call queue depth.
(Triage VS Resolution).
- Engineer paths for self-service
(i.e. password resets, automated ticket assignment).



James Murphy serves as the Director of Professional Services at Pepperweed Consulting. He has responsibility for the Technology Solution consultants who deliver engagements based upon Hewlett Packard Software's lines of Business Technology Optimization Software. Prior to joining Pepperweed, James managed an enterprise management practice and implemented integrated enterprise management systems. James began his career in 1987 as a mainframe systems programmer and technology architect in and around the Chicago area. He holds a Bachelor of Science in Computer Science from Northern Illinois University.



James

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by Doug **MUELLER**,
Corporate Architect, BMC Software



Holistic Service Support **R** *for* **X**

When you hear the term *holistic*, the next word that comes to mind might be *healing* or *medicine*. Holistic medicine is about treating all aspects of a patient—emotional, mental, spiritual, and physical—to bring about healing.

The concept of *holism*, however, dates back to Aristotle, who told us that “the whole is more than the sum of its parts.” People have applied this concept not only to medicine, but also to anthropology, economics, philosophy, and even architectural and industrial design.

Savvy IT organizations today are taking a holistic approach to service support—that is, treating the individual functions within service support as an integrated whole. Holistic service support is about replacing the traditional siloed approach to incident, problem, change, configuration, and asset management with a unified service support strategy. Companies that are already doing this are achieving greater IT efficiency and reducing costs:

- ✿ A financial services firm cut per-user help desk calls by 15 percent and escalations to second-level support by 10 percent. Overall support costs dropped 15 percent as a result.
- ✿ When consolidation increased help desk call volumes by 25 percent for a global pharmaceutical company, the service desk absorbed the increase without hiring additional staff, and still maintained its 75 percent first-call resolution rate.

- ✿ A large insurance company cut \$2,500,000 out of its service desk budget by redeploying 25 percent of its service desk agents to other jobs. Today, the slimmed-down staff easily handles the same volume of calls that came in prior to the reduction in staff.

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Just what is the secret behind the successes? These organizations transitioned to a collaborative, unified environment that optimizes and integrates service support processes, provides all service support functions with a comprehensive, holistic view of the IT environment, and expands the level of process automation.

Optimizing and Integrating

In siloed environments, disparate tools and databases are used by the service desk and incident management, problem management, change and release management, configuration management, and asset and inventory management teams. Process integration across functions is limited or nonexistent. Manual handoffs interfere with coordination among functional groups, resulting in inefficiencies and errors that drive up costs.

Process integration is a central theme of the IT Infrastructure Library (ITIL®) framework, which offers

guidance for optimizing IT service management processes. Integration of these processes allows for seamless workflow within and across functional groups in an end-to-end, closed-loop manner. Efficiency increases, the service support staff is more productive, and costs go down.

Seeing the Big Picture

Silos create tunnel vision. Each service support function is limited to a partial view of the IT environment. Service desk agents can't see support contract information maintained in the asset database. Consequently, they don't have the user support entitlement information that would allow them to quickly direct calls to the proper support source. Asset analysts don't have access to incident and problem information. As a result, their total-cost-of-ownership calculations are inaccurate because they don't include the cost of supporting assets.

In contrast, a single, comprehensive view of the IT environment ensures that all service support staff members have the information they need to perform their jobs efficiently and effectively. All functional groups work with the same consistent data. The staff easily rolls up metrics and key performance indicators (KPIs) that span functional areas, enabling IT to communicate the value of service support using metrics and KPIs that are meaningful to the business.

A holistic view shows how IT resources relate to the business services they support, providing service support teams with a customer view of the services IT delivers. Consequently, the staff can operate from a service perspective instead of a technology perspective. This is a fundamental concept of ITIL version 3, and it's essential for achieving effective business service management (BSM)—an approach for managing IT based on business priorities. BSM combines best-practice IT processes, automated technology management, and a shared view of how IT resources directly support the business. This comprehensive approach and unified platform for running IT reduces costs and maximizes business value.

Extending Automation

Point solutions automate actions within specific processes. As a result, they help reduce costs. Incident matching is an example of automating an action within an incident management process.

A holistic approach, however, extends automation to include not only actions within processes but also entire processes within a service support function. Automating incident flow from capture to resolution is an example of automating a process within a function.

Holistic service support also extends automation to process sets that span multiple functions. Automating the entire procedure—from receipt of an event-based incident through problem management to change management—is an example of the end-to-end automation of a process across support functions.

By eliminating mundane and repetitive manual tasks, automation frees up substantial staff time for strategic endeavors and also enforces the use of best practices. Cost-saving capabilities such as self-service become possible. Service request and fulfillment—enabling people to request services and check the status of their requests on their own—is a great example. In a fully automated environment, submission of a request kicks off a series of processes, gathering approvals, initiating and orchestrating the necessary fulfillment tasks, and tracking progress. Self-service slashes the number of calls coming into the service desk, which further reduces staffing requirements.

Automation can also encompass the documentation of process and audit trails. The result is an enhanced ability to demonstrate compliance and a significant reduction in the cost of compliance audits.

A Powerful Prescription

Aristotle's idea that the whole is more than the sum of its parts applies directly to service support. When service support disciplines are isolated in silos using disparate tools, they deliver only moderate gains in terms of greater efficiency and lower costs.

The best prescription is a holistic service support strategy in which service support functions are integrated into a unified whole that delivers substantially more value than the individual silos could ever achieve. A holistic approach lets you look at the big picture, enabling you to not only drive down costs, but also increase the business value of the service support organization and communicate that value to your business users.



Doug Mueller is a Corporate Architect at BMC Software and cofounder of Remedy (acquired by BMC). He is the subject matter expert for BMC Remedy Action Request System and the applications based on it. Mueller is involved with product architecture/development and works with technical leaders in the BMC Service Support and BMC Atrium organizations, driving architectural consistency. Mueller actively works with and advises enterprise customers to help with their corporate IT strategy around BMC's BSM solution set, focusing on the BMC Atrium CMDB and BMC Service Support solutions.



Doug

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PEOPLE MANAGEMENT TRACK

In any organization, it's the people who ultimately make or break your success. Processes fall apart if not appropriately and consistently executed, so providing the right people with the authority, motivation and training they need to be successful is critical. And yet these skills are some of the trickiest to master, and provide the greatest angst. This track provides tips you can use immediately in the areas so many struggle with – from organizational structures for success to daily coaching and mentoring skills.

- Workshop 101
- Workshop 201
- Workshop 301
- Workshop 401
- Workshop 501

PROCESS MANAGEMENT TRACK

This track provides a practical guide to developing, implementing and improving service management processes. Workshops include in-depth coverage of the goals, objectives, activities, and relationships between processes, as well as overcoming the inherent challenges to successful implementation. This track covers IT service management principles including defining and valuing services, service catalogs, service restoration, control processes, maturity models and knowledge management. This track is designed for service management professionals who are responsible for the processes that effectively support their business.

- Workshop 102
- Workshop 103
- Workshop 202
- Workshop 203
- Workshop 302
- Workshop 303
- Workshop 402
- Workshop 403
- Workshop 502
- Workshop 503

SERVICE REPORTING TRACK

In these volatile times, effectively measuring performance – and reporting it in a meaningful way – is more critical than ever to the success of an IT support operation. Not only does it provide important information on how you're doing and identify potential process improvements, it has the potential to increase both the visibility and the perceived value of your organization to the business. Metrics done well are a powerful tool to focus your resources where they will have the greatest impact – but this requires identifying what to measure, and measuring it right. This track will provide the insight you need to ensure that you are harnessing the full potential of your measurement and reporting efforts.

- Workshop 104
- Workshop 204
- Workshop 304
- Workshop 404
- Workshop 504
- Workshop 505

GOVERNMENT TRACK

Service Management initiatives are as important for the Federal government as for profit organizations. Government agencies have been tasked with becoming more efficient and effective through the use of Information Technology initiatives. This in depth track will help not only government agencies but corporately held organizations improve their current service management initiatives, by focusing on case studies and proven Service Management implementation techniques that have driven improvements throughout the Defense Information Systems Agency (DISA).

- Workshop 105
- Workshop 205
- Workshop 305
- Workshop 405

STRATEGIC BUSINESS ALIGNMENT TRACK

Today's uncertain economic environment requires IT managers to be more strategic than ever. In order to thrive, they must ensure that they are maximizing the value of their organization to the business – and communicating this value effectively. This track examines various strategic options for increasing your business value, and provides savvy tips on learning the language of business in order to improve your perceived value and get the funding you need to succeed.

- Workshop 106
- Workshop 206
- Workshop 306
- Workshop 406
- Workshop 506

Tracks

⌘ In-Depth Workshops ⌘

Effective Negotiation Skills for Daily Life
ITSM Organizational Structures and Leadership Requirements for Success
The Blueprints for Building, Leading, and Sustaining a World-Class Team
Coaching, Mentoring, and Performance Reviews for Improved Performance
Mastering the Human Side of IT Service Management

Implementing Best Practices in Service Restoration
Knowledge Management Best Practices within Service Management
IT Service Management for Service Desk Management: The Basics... (and it's not just about ITIL)
Implementing Proactive Problem Management
The IT Service Management Implementation Plan: A Phased Approach to Improving Service Delivery and Support
Critical Service Management Priorities in a Shared Services Delivery Model
Making Effective Service Catalogs a Reality for You
Process Maturity Models and Self-Assessment Tools: Your Roadmap to the Next Level
Defining and Valuing IT Services: In Hours, Not Weeks!
Effectively Managing Service Change and Deployment

Operational and Service Metrics: Justifying Staffing for Service Levels
Continual Service Improvement: Why Good Enough is Never Good Enough
Determining KPIs That Drive Success
Balanced Scorecard: How to Measure IT's Value to the Business
Service Quality Measurement
Quality Assurance Monitoring: Call, Ticket, Knowledge and Email

IT Service Management in the Federal Government: A DISA Case Study
Performance-based Contracting
Streamlining Department's Information Technology Services: Defense ITIL
Service Desk as an "Enterprise Service Desk"

The Secrets of Successful Business Service Management: How IT Has to Operate in Today's Uncertain Economy
Developing the Business Case for your Service Management Program
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DEAR DR. JIM,

I know you have discussed how problem management can help reduce recurring incidents and how to form a proactive problem management team in previous articles. But I don't think you have mentioned the Known Error Database and how it might help with incident resolutions. I have heard colleagues in other companies talk about the Known Error Database and that it helps incident management. What is this database and will it really help us resolve incidents?

—Waiting in Wasilla

DEAR WAITING,

You are right about the Known Error Database (KEDB). I haven't really talked about it yet. Before I do, I need to cover some basic information about incident management, problem management, and change management.

Incident Management

Incident management is something that every IT organization must do. There are usually many events that disrupt activities of the business or are interruptions to normal service. These events are *incidents* and must be resolved as quickly as possible. Incident management is the process we use to resolve incidents. But resolving incidents is merely removing the symptom of the event so that the business can go back to work after one of these events has occurred.

Sometimes when we have a particularly troublesome incident or one that keeps recurring, we need to go a step further in resolving it. That's where problem management comes into play.

Problem Management and Change Management

Problem management is the process responsible for managing the lifecycle of all problems. A *problem* is the unknown cause of one or more incidents. Problem management will investigate to try to find the root-cause

of the problem, determine the best temporary workaround, and assess the steps that need to be taken for a permanent fix of the problem. Problem management will then initiate action for the permanent fix. This usually entails filling out a Request For Change (RFC) form and submitting the request to the change management process for further disposition.

Change management will then review the request and assess the recommendation made by problem management. The assessment would require many steps, including but not limited to, determining the level of risk of doing or not doing the change, the level of impact to the business of doing or not doing the change, and the cost of doing or not doing the change. If change management and the business agree that the change should be done, then the "permanent fix" would be undertaken by change management and release and deployment management processes.

A *workaround* is a way of reducing or eliminating the impact of an incident or a problem until a permanent resolution can be implemented. An example might be asking a user to reboot their PC to clear an error message. Once the reboot is completed if the error message is gone, the user can quickly go back to work even though we really haven't "fixed" the PC. We have just found a method to work around the error that has occurred.

If we have a problem and have investigated and found the root-cause of the problem and have a workaround to use temporarily, we now have a *known error*. Where we document known errors is the *Known Error Database (KEDB)*. The known error record we create should have the workaround documented in the known error record. The purpose of the KEDB is to allow the storage of your previous knowledge of incidents and problems including the steps used to overcome them so this information can be reused as appropriate. Therefore it is important to be sure that this information is easily searchable so it can be quickly and accurately retrieved.

To maintain accuracy and consistency in the information kept in the KEDB, only the problem manager or those designated by the problem manager should be allowed to open or update records in the KEDB.

Known errors are also identified by application developers or third-party suppliers. These should also result in a known error record being opened in the KEDB by problem management.

Incident vs. Problem

Where incident management is attempting to remove the symptom of an incident, problem management is attempting to find the root-cause of the symptom and determine what control action is required for a permanent solution.

The real value of the KEDB is to speed up the diagnosis and resolutions in incident management. Here is how that might take place:

Incident Matching

In incident management there is an activity called *incident matching*. Whenever someone is trying to resolve an incident they will try to match the current incident with one they have previously seen. So they will search the KEDB to see if there are known error records with similar symptoms. If a match is found they should re-use the workaround to see if it also resolves the new incident. If it does, this helps to more quickly resolve new incidents soon after they occur. So the KEDB should be feeding workarounds to incident management.

Incident matching may be the most important activity in incident management since it allows for quicker resolutions

to take place. Remember that the goal of incident management is to resolve incidents as quickly as possible. Quicker resolutions mean that the user will be non-productive for less time. Lost productivity can lead to lost revenue, so delaying incident resolution can have a deleterious effect on the bottom line. The KEDB is a tool that can enable faster, more accurate incident resolutions.

I hope this explanation has provided you with some ammunition to undertake the task of integrating an effective KEDB into your problem management plans.



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/drijim>. Drop by the blog and make a contribution!

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PROJECT MANAGEMENT

and IT Service Management (ITSM) best Practices.

by Mauricio CORONA

Over time, there is a greater need for IT executives to manage resources efficiently to try to demonstrate to the business the contribution IT makes in providing significant value. It has become a critical issue for IT to deliver effective IT services and at the same time reduce costs in light of the fact that budgets are extremely low and stretched. Therefore, IT managers are implementing best practices to manage their technology services because they need to increase the predictability, efficiency, and quality of the services, reduce support costs, and comply with regulatory requirements.

IT service management best practices are geared towards the integration of IT in business operations. However, when trying to implement, many questions arise since the implementation of these best practices goes far beyond having the will to do it. Therefore, regardless of the framework for best practice that is chosen (ITIL®, COBIT, MOF, HPITSM, ITUP, etc.), a critical success factor in adopting best practices is the implementation of IT service management processes as a formal project within your organization. Some of the benefits of using project management to implement your service management processes include:

- Centralized control
- Improved focus
- Clear definition of what has to be delivered by whom and when
- Improved communication
- Avoidance of bias

Project Management Stages:

1 Integration

Integration encompasses the way in which every aspect of the project should work in conjunction. In the project management context, integration includes characteristics of unification, consolidation, articulation, and integrative actions that are crucial to project completion, successfully meeting customer and other stakeholder requirements, and managing expectations. This includes making choices about where to concentrate

resources and effort on any given day, anticipating potential issues, dealing with these issues before they become critical, and coordinating work for the overall project good.

This stage requires a lot of organization because you have to develop, coordinate, and record the project plan and its implementation tied to the needs of your organization.

2 Scope

This stage includes the processes required to ensure that the project includes all of the work required (and only the work required) to complete the project successfully. Project scope management is primarily concerned with defining and controlling what is and is not included in the project. These processes are:

1. **Scope Planning**—Here you have to create a project scope management plan that documents how the project scope will be defined, verified, and controlled. Be sure to clearly define the ITSM processes that you are going to implement.

2. **Scope Definition**—Here you have to develop a detailed project scope statement as the basis for future project decisions.
3. **Scope Verification**—You have to formalize the acceptance of the completed project deliverables.
4. **Scope Control**—Define how changes to the project scope are going to be addressed.

At this stage, be sure to be clear about what ITSM processes, functions, and activities will be realized, since the following stages depend on the proper definition of this stage, and even the project's success.

3 Time

This stage includes the processes required to accomplish timely completion of the project; these processes are:

1. **Activity Definition**—You have to identify the specific scheduled activities that need to be performed to produce the various project deliverables according to the service management processes defined in the previous phase.
2. **Activity Sequencing**—Identify and document dependencies among scheduled activities.
3. **Activity Resource Estimating**—Estimate the types and quantities of resources required to perform each scheduled activity.

4. **Activity Duration Estimating**—Estimate the number of work periods that will be needed to complete individual scheduled activities.
5. **Schedule Development**—Analyze activity sequences, durations, resource requirements, and scheduled constraints to create the project schedule.
6. **Schedule Control**—Define how changes to the project schedule are going to be addressed.

You must have a well-defined list of activities for executing each ITSM process in order to clearly establish the timeline for the implementation of each process.

4 Costs

This stage includes the processes involved in planning, estimating, budgeting, and controlling costs so that the project can be completed within the approved budget; these processes are:

1. **Cost Estimating**—You have to develop an approximation of the costs of the resources needed to complete project activities.
2. **Cost Budgeting**—Here you have to add the estimated costs of individual activities or work packages to establish a cost baseline.

3. **Cost Control**—Finally you have to influence the factors that create cost variances and controlling changes to the project budget.

Identify the best possible resources that should be involved in the project. Make a cost estimate and don't forget to calculate your Return on Investment (ROI).

5 Quality

This stage includes all the activities of the performing organization that determine quality policies, objectives, and responsibilities so that the project will satisfy the needs for which it was undertaken. It implements the quality management system through the policy, procedures, and processes of quality planning, quality assurance, and quality control, with continuous process improvement activities conducted throughout, as appropriate.

Ensure that the deliverables of each activity regarding the implementation of service management processes are aligned with the expectations of the project. To measure the reliability of your results you can rely on tools to improve the quality: Pareto Diagrams, Six Sigma, Deming, etc.

6 Human Resources

This stage includes the processes that organize and manage the project team. The project team is comprised of the people who have assigned roles and responsibilities for completing the project; here you can use a responsibility assignment matrix (RAM) to illustrate the connections between work that needs to be done and project team members, the most common type of RAM used on the implementation of service

management processes is called a RACI chart because the names of roles being documented are Responsible, Accountable, Consult, and Inform.

You must identify and deploy adequate resources in each of the various activities of the project. If possible, develop a skills matrix of your staff and assign work teams according to the strengths and weaknesses of each person.

7 Communication

This stage is the knowledge area that employs the processes required to ensure timely and appropriate generation, collection, distribution, storage, retrieval, and ultimate disposition of project information.

Identify, with precision, how information will flow, both inside and outside the project. It is extremely important to engage the entire organization since one of the most common major flaws in the implementation of IT best practices is the lack of communication at all levels of the organization.

8 Risks

The objectives of this stage are to increase the probability and impact of positive events, and decrease the probability and impact of events adverse to the project.

Make sure your risk management plan is linked with the project scope, priorities, and project delivery to enable timely deliverables. Late deliverables may not seem to affect the project immediately, but you may find that you will no longer receive support from management. Your ITSM implementation can therefore be seen as a very expensive project with a lack of timely results. You may, for example, use a risk management simulation model such as a Monte Carlo simulation to avoid mistakes.

As we can see, project management provides the capability to implement a defined project in a controlled way, so that cost, schedule, and quality of deliverables are as expected. Remember that implementing ITSM processes with a high level of maturity is an extremely difficult task that requires much effort. However, if the implementation of these processes runs as a project, you will have a much greater chance of successfully achieving the results you expect in a more effective and efficient way.



Mauricio Corona has excelled as a leader in implementing solutions related to IT Service Management in different organizational areas and industries in several countries as well as being an IT service delivery manager, speaker, ITIL Expert, service manager and teacher at master's level. He is an IT Researcher at La Salle University in Mexico City and a Consultant with Pink Elephant in Latin America's office. Mauricio has a bachelor's degree in Computer Science and a master's degree in Information Technology. Send questions or comments to m.corona@pinklephant.com and mcc@ulsa.mx.



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Why Are Soft Skills Important?

by Dr. Tracy O'NEILL

In many positions and occupations, job performance is soft skill dependent. Companies use assessment tests, such as the Myers-Briggs Type Indicator and the Mayer, Salovey, Caruso Emotional Intelligence Test, so they can get an idea of what soft skills employees possess. These skills are often intangible and, therefore, not easily taught. They tend to be more a function of personality characteristics. Some examples of soft skills include: responsibility, self-esteem, sociability, self-management, integrity, and honesty. Examples of interpersonal soft skills include: participates as a member of the team, teaches others, serves customers, exercises leadership, negotiates, and works with cultural diversity.

Hard and soft knowledge are both important in the working world but employees who lack the ability to manage their lives, take responsibility for their own success, and follow through on commitments need to learn soft skills along with the hard skills required for a job so they understand how all aspects of their lives connect. Soft skills provide a way to get the highest return on investment when considering human capital. They can build great people. Few individuals are

fired because they lack technical knowledge. Most are fired because of a deficit in soft skill knowledge. Ultimately, what we know is not nearly as important as what we do with what we know, and how well we do it.

Some organizations will attempt to train soft skills but training is a use it or lose it proposition. While a participant may be motivated and excited after returning from a program, preexisting thought patterns can work against implementation. Many trainers will admit that follow up is necessary for retention. The transfer of training includes both generalizations of training on-the-job and maintenance of learned material. For this to occur, abilities must be learned and retained through practical experience and repetition. The work environment, including cultural climate, management and peer support, and performance opportunity, is vital to this achievement. Coaching is a tool that can help arrive at transfer of knowledge by recalling the lessons learned, reinforcing their importance, and motivating the client to move forward, despite obstacles or roadblocks. It is suggested that peer coaching, group coaching, or manager to employee coaching take place as follow-up. These techniques will make soft skill retention possible.



*Dr. Tracy O'Neill is a coach, consultant, and mediator to business leaders who have goals to accomplish or work challenges to solve. Learn about her soon to be released book, *The Coaching L.A.B.* Visit www.925Coaching.com.*

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BUILDING STRONG TEAMS

This is an excerpt taken from the book, "Help Desk Manager's Crash Course," written by Phil Gerbyshak and Jeffrey Brooks. For more information, visit <http://helpdeskcrashcourse.com>.



by Phil **GERBYSHAK** and Jeffrey **BROOKS**

Assuming that you live and work in this universe you have heard about the importance of having a strong team. A group does not constitute a team; nor is a minimum number of people required.

A team comprises a group of people linked in a common purpose. The best teams have members with complementary skills and generate synergy through a coordinated effort that allows members to maximize their strengths and minimize their weaknesses. A team works together towards a common purpose and their skills are required to function in unison to complete the task.

If a team is linked by common purpose then team building includes:

- a) Clarifying the goal and building ownership across the team;
- b) Identifying the inhibitors to teamwork; and
- c) Mitigating their negative effect on the team, including removal from it.

Your job as manager is to engage in activities that ensure the members of the team understand the specified goal and work towards removing any obstacles that may prevent achieving it.

Challenges abound whether you are building a large team or a smaller one. With larger teams, in addition to the standard management headaches, there are increased logistical issues when scheduling, far more disparate personalities, more opportunities to play politics, etc.

Smaller teams face the reality that one team member who isn't working towards the shared vision has far more disruptive power and does more damage faster. Worse, as people notice, they will start to exclude that person; decisions are made without her input further reducing engagement; the cycle keeps repeating further alienating both sides and tearing the team apart.

As with disengagement, a single voice of dissent will have a much larger impact. This does not mean that team members should always agree, but the same person constantly disagreeing is less easily ignored in a group of four than fifty.

TWO WAYS TO BUILD A TEAM

With a basic understanding of what a team is and why we might have team building exercises, it is time to tackle a very large myth of team building. The idea that forcing your team to have dinner together is team building is simply a fallacy. Don't get caught up in thinking that ordering a pizza for the office is team building. While we are not condemning the act of feeding your employees, don't be mistaken that giving away free food to a group of people in the same area is team building.

There are two distinct types of team building, goal-based and just for fun, and they work best when both are used. Whichever you choose, be prepared for statements such as, "I don't know why we are doing this," or "This is so corny." For a variety of reasons, some people just aren't comfortable with team building exercises, especially the physical ones. If this happens, take the person aside, discuss the reaction privately, and help him get comfortable with doing it.

In some cases, there can be a valid physical reason, such as being out-of-shape or a heart condition, or a psychological one, such as fear of heights, which prevents him from wanting to participate. Minimizing, ridiculing, or embarrassing him in front of the team won't accomplish anything, whereas an honest discussion that respects his feelings will go a long way to building trust and resolving the situation. If the reason is real, then you may want to consider using a different exercise or finding a way for him to participate differently.

GOAL BASED TEAM BUILDING

Goal based team building focuses on one specific goal. It can either be stated up front or taught at the conclusion of the exercise, much like the moral of a story.

There are many kinds of goal based exercises, from the simple to the extreme. They range from a brainstorming session to writing the department's mission statement to a ropes course designed to build trust.

The key to success lies in the fact that the exercise leader, whether that be you as the manager or someone else, knows exactly what the goal is before the exercise begins. You can't wing it or change it after the fact—your team will know, trust will be reduced, and your authenticity will take a major hit. You need to prepare, know exactly why you are doing the exercise, what you want to accomplish,

and be ready to discuss openly the results and how they affect the dynamic of the team.

Decide whether to state the goal up front or at the end based on what you want to accomplish. In some cases, the lesson learned is more powerful when the explanation of the goal comes at the end. Explain the goal at the start when you will be referencing it throughout the exercise.

JUST FUN TEAM BUILDING

Just fun team building focuses on improving relationships. Relationships are the basis for our lives. All your activities revolve around relationships, whether with your family, friends, co-workers, help desks, retailers, etc. You can't avoid them—relationships are everywhere. Because fun events focus on relationship building, it helps when you use ways in which your team gets to know each other away from the office and the pressures of the customer. Even fun exercises should be guided, with a definite goal in mind.

Venting together can be turned from a negative dumping into a positive coming together if you add a "solve or neutralize" component. You do this by having one person rant and then everyone brainstorming ways to get over/through/around the problem. They can be serious, silly, or even outrageous, the goal is to share laughter and diminish the effect of the irritant.

Sometimes a serious problem will be uncovered during a rant; one that is a molehill just waiting to become a mountain. When that happens, ask everyone to think about ways to address it and schedule a time to meet and resolve it.

Eating together is always good. Whether you take your people out or order pizza in, eat together and get to know each other. Avoid talking business. If the conversation lags, suggest one of many verbal games; if the conversation is dominated by a topic that does not engage everyone, gently steer it in another direction.

If your desk runs 24/7, whether large or small, it is almost impossible to find a time for the whole team to get together. In that case, ordering in, rotating people and having more than one event usually works well.

Just fun team building exercises are excellent when the unstated goal is bonding. These can be everything from pickup basketball to organized off site events that include families. Family events don't have to be expensive. BBQs in the parking lot and potlucks are great socializers.

Bringing families together puts names to faces; it lets spouses meet the people their partners spend nearly half their time with; kids meet and often become friends.

The more comfortable your employees are around each other, the more vested they will be in their colleagues and productivity will rise.

Not all people are comfortable socializing with their workmates, so when the event is on their own time you shouldn't use coercion techniques to force them. Rather, you need to learn why someone doesn't want to participate. Is it scheduling, family commitment, or no interest in the activity? Be willing to work around these problems by creating events that circumvent or avoid them.

Will you have a problem if their reluctance remains? That depends on the individual. Some are so standoffish that it can increase stress and lower productivity (why did you hire them), while others are just very private people who prefer to keep work and personal life totally separate, but play well with the team during work hours.

For more information, visit <http://helpdeskcrashcourse.com>.



Phil Gerbyshak has worked in IT service and support since the mid 1990s, working at startups, Internet service providers, financial service corporations, and many more. Phil currently serves as vice president of information technology at a financial services firm that has been nationally recognized for the last six years as a great place to work. Phil combines his broad business, IT, and leadership experience to help make it great.



Phil

Jeffrey Brooks has built and guided teams that became recognized nationally and internationally gaining accolades from leading industry lights such as Service Awards for Customer Service and HDI's Team Excellence Awards. Jeff has also coached local HDI Analyst of the Year winners in multiple markets as well as a regional winner. Like Phil, Jeff brings an MBA's viewpoint to the help desk.



Jeffrey



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Customer Satisfaction Index Service



Some **GOOD IDEAS**

(and a few bad ones to avoid) for

Financial Services Self-service Portals and Web Sites

*Self-service saves companies money, gives customers information instantly, and liberates agents from answering repetitive questions. But self-service also can fuel **the perception** that a company is uncaring or arrogant—not wanting its customers to talk to live human representatives.¹*

Self-service is all the rage in many financial services organizations and for some very good reasons; self-service portals allow employees and customers to access account information and other important information without calling and waiting for a human being to answer the phone. However, as anyone that has ever visited a Web site or a support portal knows, such sites can be either a source of joy because of their ease of use or they can become a spider's web of confusion, frustration, and anger.

GOOD IDEAS

To avoid the latter and build the former, here are ten good ideas (we're avoiding the terms "best practice," "world class," and "industry standard") and a few bad ones to use in building a customer Web site or a support portal:

Good Idea #1

Remember who the sites and portals are being built for. Far too many sites are built for the IT shop, the C-level suite, and the marketing department. If you want users to use it, make it usable!

¹ Emily Yellin, *Your Call Is (not that) Important to Us—Customer Service and What It Reveals About Our World & Our Lives* (New York: Free Press, 2009), 94.

by Robert **LAST**



Good Idea #2

Don't confine the site or the portal to endless lists of links, tabs, and text. As our colleague Paul Dooley observes, the Web has more tools than simple HTML pages:

- \$ **“Wikis**—where the people publish the content themselves under the guidance of a hosting organization.” Excellent for technical support staff to gather and publish information and a good tool for customers to easily access information.
- \$ **“Blogs**—Web logs where individuals share their thoughts, opinions, and advice via online journals.” A good way for an organization to share information and to monitor what its users have on their minds.
- \$ **“Personal Web sites**—Via tools like MySpace and Facebook that are forming a new communications platform for people.”² Probably the great undiscovered territory of both the support side of the IT world and the customer-facing side of a business, but it holds considerable promise.

Good Idea #3

Plan service levels for each support channel. For example:

- \$ **Web Submissions**—Acknowledgement of 80 percent in 30 minutes, 100 percent in 60 minutes.
- \$ **E-mail Submissions**—Acknowledgement of 80 percent in 60 minutes and 100 percent in two hours with a **maximum of three e-mail exchanges before incident is converted to a live contact.**

\$ **Chat**—An Average Speed of Answer of less than 60-90 seconds with a time limit set on when a chat session is converted to a live contact; a transcript of the chat session sent to the user via e-mail and a minimum of instances of being “put on hold” during the session.³

Measure Everything: Contact channels are like the body's circulatory system and one of the ways the circulatory system is monitored is by taking blood pressure. In a support and customer service environment, however, a manager has to use more than one number, for example:

- How many users are using what contact channel?
- When do requests arrive through the different channels? (For example, do the peaks and valleys of Web-based submissions match the e-mail volumes?)

- What types of requests arrive through the different channels?
- To what percentage of total contacts does each channel contribute?
- Which agents appear to be most efficient at resolving problems and answering questions from each channel? Note: There will be differences in performance from one channel to the next.)
- What types of calls are most efficiently resolved through each channel?
- How many incidents come through one channel (e.g., e-mail), but end up being “converted” to another channel?
- What is the “abandon rate” for each channel? How many users submit an e-mail, but end up placing a telephone call instead?⁴

Good Idea #4

Build a business case.

Our colleague Pete McGarahan observes that:

“The business case is the means by which you can obtain buy-in, funding, and resources for the first phase of the self-service initiative. In this phase you define business value and the requirements necessary to deliver it; identify an approach that will balance investment with return and begin the process of creating a clear vision and strategy for success.”⁵

² Paul Dooley, *Building a Web Self-service Portal: Keys to Success* (Colorado Springs, CO: HDI, 2007), 10.

³ Eldon Brown, *Beyond Customer Service: Maintaining a Consistent User experience in a Multi-channel Environment* (Colorado Springs, CO: HDI, 2003), 17-18.

⁴ *Op cit*, 20.

⁵ McGarahan & Associates, *Self-service success: A Strategic Guide to Self-service for the IT Help Desk*, URL: www.mcgarahan.com, 2006.

BAD IDEAS

Good Idea #5

Attract customers to Web self-service.

- Don't complicate something that should be simple; customers using Web self-service often feel inconvenienced already; don't add to their frustration by burying content in complex or confusing navigation schemes.
- How the Web site or portal looks is less important than how easy it is to use; in a perfect world there should be a balance between the two.
- Remember that what the customer/user wants should be the guiding principle in how the site or portal is developed.
- Provide multiple methods for finding answers—search, point and click, FAQs, solution finders, and glossaries are "...powerful tools that have the same high-level objective, but approach knowledge from slightly different points of view and (sometimes) different process orientations."⁶



⁶ Bob Perry, "The Shift to Web Self-service," November 2007, URL: www.talisma.com/kmprocess.

Bad Idea #1

Design the Web site or the support portal for the IT department, the C-level suite, or the marketing department. Yes, you've heard this before, but as many veterans of customer service Web sites and support portal projects will tell, it is common to see such projects become nightmares of ego-driven, self-satisfied, complexity when what is required is simplicity. One of the best examples of this type of thinking is www.cleveland.com or almost any local television Web site.

Bad Idea #2

Accept the foolishness of "...if we build it, they will come." This idea is closely related to Good Idea #1 and is based on corporate self-delusion, avoid it at all costs.

Bad Idea #3

Assume that as soon as the site or portal is active that customers and users will flock to it. NOT! People being people, they will examine sites and portals and ask themselves the perfectly logical question, "What's In It For Me?" or WIIFM. If they see no value in using the site or portal, they won't. Just because the designers and project team thinks it is great does not mean everyone or anyone thinks so.

Bad Idea #4

Ignore requests for help from users. This idea comes from the belief that just because the automated "Help" function and tools have been activated that they will work. First, you have to define "work," second, you have to track the KPIs related to the "Help" function, and third you have to ask your customers what they think about it.

Bad Idea #5

Never update the Web site or the portal. Once established, many sites and portals fall into a time warp where they are rarely if ever updated and where they become a sales tool, a press release mechanism, and a marketing device. Such characteristics are indicative of an organization that is not customer-centric, customers know when they are being manipulated and they don't like it.

Finally, like most successful IT projects, include not just the IT staff but the key people in an organization. This characteristic also applies to customer Web sites and technical support portals; failure is easy, success is harder, so keep the design of the site and portal relatively simple and think about the people that will use them. Don't do this, and your sites will be a drain in resources and one of the most unused aspects of your IT infrastructure.

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

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SELF-SERVICE

What a Customer

We are familiar with FAQs, knowledge bases, and forums. In a study according to Jupiter, 57 percent of customers prefer to help themselves—not only this, they want service fast and prefer access across multiple channels. We see social networking, mobility, and advanced technology innovation influencing core relationships with our customers. What affect is this having on the way we provide self-service to our customers? What do we see in the future for self-service?

Phil Trant

Managing Consultant, N.A. Axios Global Services

As the profile of an average IT customer shifts from “computer aware” to “Internet expert,” expectations for support rise. Today’s customers are accustomed to receiving instant answers to queries typed into online search engines, ordering, and reservation systems. Customers want self-service interfaces available on PCs and mobile devices that match their daily consumer experiences. In response, IT should strive to implement user-friendly self-service portals with readily accessible how-to and service request information.

Once customers log their service requests, communication becomes critical in managing expectations and delivering quality service. It does not matter how diligently IT works in the background, without proper communication, customers may perceive that IT ignored their requests. Providing customers a choice for communication options—such as phone, e-mail, or text—for status updates helps IT boost customer satisfaction.

Perhaps the bigger opportunity for IT is the ability to shift resources to reduce support requirements. While there will always be a need for the service desk to provide support and respond to customer requests, the IT organization should dedicate time and resources to improve IT processes that proactively prevent service outages and disruptions. Using best practice frameworks like ITIL® is one way companies are already working to do this. Implementing strong processes along with a solid CMDB—integrated with discovery and monitoring tools—provides visibility into current issues and facilitates proactive problem management while also supporting evolving user requirements and enabling automated service requests.

What customers really want is to go about their daily business without needing support.

Wants

Jeff WeinsteinPresident and CEO, *RightAnswers, Inc.*

The challenges and opportunities surrounding knowledge related self-service versus transactional self-service are two sides to the same coin. Content and social conversations are available in quantity publically but lack trustworthiness. The growth of information from social networking adds value, but the noise this content presents to the user is growing at an incredible rate.

Today's users are more willing to troubleshoot and experiment on how to fix their own issues. They rely on social networks to validate information on the effectiveness of any solution. This process requires searching for answers, accessing those sites, reviewing, validating, and then attempting the solution. This may ultimately be effective but too time consuming for users to go through.

What may emerge are two responses to this situation, first advocacy groups and methods that rate contributors may emerge. This may be done through a combination of user ratings and independent evaluations of the contributor, still requiring extra time to find the right solution. Secondly, with demand for content growing we will see organizations require users to register. This would likely be on a pay to access basis or requiring users to agree to be heavily advertised to.

Clearly the need for access to reliable content from a trusted and accountable source will grow in demand. Increasing acceptance of self-service combined with an expanding sea of questionable information will increase the willingness to pay for a trusted source. This allows companies to achieve the financial rewards necessary to encourage investment and innovation in these projects.

**David Verlin**Director of Marketing, *ASPG, Inc.*

Providing self-service abilities is core to all customer driven organizations. In this age of mobility and immediate gratification, customers expect nothing less than the ability to access accounts at will.

The 3 "S" approach to providing self-service abilities to customers:**Simplicity**

Access to accounts, modifying information, and completing transactions in a few simple steps is key to the success of a self-service function. Too many steps, asking for too much information, or a complicated process will drive customers back to the phones. Call center costs will increase and customer satisfaction may decrease. To keep up with customer expectations and emerging social networking, companies will need to provide customers access no matter where they are: by phone, handheld, or computer.

Savings

Self-service abilities must provide a significant savings. Saving time, money, and aggravation all play a role in customer acquisition, loyalty, and retention. Providing customers with self-service options also presents a huge savings for corporations in time and money. For example, the cost for a large organization receiving 3000 password reset related calls per month can be over \$1,000,000 per year. Providing self-service password reset capabilities could reduce this by up to 100 percent. Corporations can now reallocate their personnel resources to other areas that are not automated as a self-service function.

Security

In order for a self-service option to be successful, users must feel their data and the process are secure. Secure servers, password protection, and authentication need to reassure the customer in their choice to complete the transaction independently.

The growing trend of customer self-service and independence will continue at a record pace with security and accessibility as two of the key components.

● The Smart Information

Anytime—Anywhere

by Vance F. BROWN

Information Technology is experiencing a “revolution” with the introduction of smartphones—which are changing the rules of the game in the way we respond to critical information within our organizations.

Admittedly, the word “revolution” is overused, so I want to be very careful before jumping on that rhetorical bandwagon. The Merriam-Webster Online Dictionary defines “revolution” as a *sudden, radical, or complete change*. In the IT world, when talking about smartphones, such as the iPhone or BlackBerry, and their related native applications, the word *revolution* is appropriate. We are on the verge of a radical change in the delivery of mission-critical information, and more importantly, the ability to make timely mission-critical decisions on the fly because of this technology. The way we work, interact, and manage within the IT environment will never be the same.

Just today I was sitting in my Colorado office wondering, with some concern, how my eighteen-year old son was doing. The night before he departed on a one-month trip to Ghana, Africa, and I knew—from one of my many iPhone apps—that his plane had landed.

The next thing I know, my iPhone beeped and there was a text message from my son, sent only seconds before, from the other side of the world. The text message reported that the plane had landed safely, that he had found his contact in Ghana, and that everything was fine. Once in Ghana, my son merely hit the “reply” button to a message I had sent to him while he was still in Colorado. The exploding worldwide network of mobile phone coverage recognized that he was now in Ghana and it immediately routed the text message back to my cell phone in Colorado. Perhaps the most amazing part of this is how much we take instant access to information like this for granted.

The relief of knowing nearly instantaneously that my son was safe was wonderful, but it also caused me to reflect on the dramatic changes we are experiencing with mobile phone devices, and how they are radically changing our daily lives with respect to information technology. Obviously, smartphone devices have been around for a while, and by themselves there is nothing revolutionary about them. We are in the midst of an information delivery revolution because of (i) user-friendly smartphones with sophisticated third party development platforms; (ii) business-specific applications developed by IT service management software vendors for these devices; (iii) the expansion of 3G and faster networks; and (iv) lower prices to take advantage of this technology.



rtphone Revolution

Information Technology

“After-the-fact” Information. Not very long ago, IT data went into the proverbial “black hole,” and most information extracted from this dark repository was reviewed and acted upon too late—“after-the-fact.” Although many organizations were proud of their book of monthly reports, most of the information was never used nor acted upon in a timely manner. In the comedy film *Office Space*, this cultural reality of useless reporting became the brunt of jokes with “TPS Reports,” which historically were valid Quality Assurance reports, but now have become more commonly known as “Totally Pointless Stuff” reports. Information in printed reports, utilizing historical data, is often too late to make course corrections. Admittedly, reporting is still important for trending and analysis. However, with the advent of this latest mobile revolution, technicians and managers are now in the position to instantaneously receive and use data, no matter where they are, to make real-time decisions and instant course corrections.

How important is this? If you were taking a plane trip from San Francisco to New York City, but were two-degrees off the destination, how far would you be off course? While it is true that being only two-degrees off would equate to success in most organizations, in this example, you would end up nearly 90 miles from your desired destination—an unacceptable result in air travel. Accordingly, today’s planes and cars can be equipped with “revolutionary” GPS devices that can proactively warn you the moment the vehicle has veered off course. Such information saves a lot of time and money by allowing us to make the right decisions and course corrections before it is too late to meet our timely objectives.

Anytime—Anywhere Real-time Information. With the new generation of smartphones, real-time information in our IT business environments can be used to make course corrections along the way—anytime and anywhere. Equally important, because of how user-friendly these devices have become, they are being used by people who were previously uncomfortable with the technology, or too busy to learn it.

I recently visited a major university and was honored to meet the university president. I had been told by others that this brilliant PhD was not technically savvy and did not like to spend a lot of time on his computer. However, I noticed that he did carry an iPhone. Before long, we were in a passionate discussion comparing our iPhone applications, trying to convince each other which applications were the best. He then was quite intrigued when I told him that there are iPhone applications that could notify him of any change requests that required his approval, providing him all the

details needed to make a decision. He could then immediately approve or deny the request directly from his iPhone. Change approvals are often a bottleneck in organizations, especially when some of the approvers are frequent travelers, making it difficult to stay online.

The inefficiencies and costs caused by delayed approvals are significant in organizations, especially for approvals at the C-level. Such change approvals at the C-level typically are to approve the most expensive acquisitions—those that presumably have the most positive impact to the organization, and perhaps the most risk. Accordingly, such delays in the approval process are the most critical to the organization.

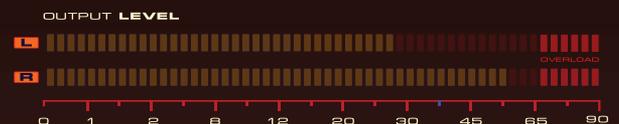
Change approval functionality is only the tip of the iceberg of possibilities. Imagine how the university president could utilize drill-down dashboards on his iPhone that would show—real time—all the key performance indicators in his university. He could be immediately notified if any of the key university metrics enter the “red zone.” For example, if alumni giving were down, he would know immediately. If there was a poor rating from an online faculty survey, he could review the survey from his iPhone within seconds of when it was sent. If there was a campus security alert, he could be immediately prompted from his mobile device with the relevant information...and the list of possibilities goes on. This type of management efficiency has often been referred to as “management by exception.” In other words, managers don’t want to be notified about information that is “normal” or in the “green” zone. Instead, they want to be immediately prompted when issues are in the “yellow” or “red” zones—when the ship is “off course.” This is the first IT generation where “dashboard prompting” and the resulting course corrections can be administered through a small smartphone device that is already part of everyone’s wardrobe.

The president of the university and his core management team are not the only benefactors of this mobile revolution. The efficiencies gained by the university’s IT staff can be enormous. For example, while a technician goes to a facility on campus to deal with an incident or related task, he or she can open an iPhone application and access all the other pending tasks at the facility. The technician can then close the incident or task, reassign it, or make notes for later follow-up—all from an iPhone. Of course, these updates are simultaneously changing the IT service management database on the central server.

The user experience is dramatically enhanced when the university president or the technician is able to utilize an iPhone “rich-client” application natively developed for the iPhone. But, if the application can be accessed only through iPhone’s Safari browser, then the user experience is slow and diminishes dramatically, and the likelihood for consistent and “passionate” use is minimal.

Twenty-five years ago, the idea that I would always carry a phone in my pocket that could communicate instantaneously with my son from anywhere in the world at any time would be “Star Trek” fiction—“beam me up, Scotty.” But it is a reality of the communication revolution. Today, the idea that that management and technicians can access from their pocket phones the necessary information to make vital course corrections—at anytime from anywhere—is truly revolutionary.

The benefits gained from the ability to make real-time change approvals and course corrections by management, together with the efficiencies gained by frontline technicians, represent radical change for our industry. Wendell Phillips once said, “Revolutions never go backwards.” Revolutionary mobile smartphone technology is available that will inevitably change the way all Information Technology is delivered. Don’t wait... join the revolution!



Vance F. Brown is CEO and a founder of Cherwell Software, a leading developer of IT service management software, available On-Premise or On-Demand. Formerly, Vance was president and CEO of GoldMine Software Corporation (formerly Bendata, Inc. and currently FrontRange Solutions®—the makers of HEAT® and ITSM software solutions, and GoldMine® contact manager). Vance graduated *summa cum laude* from Wake Forest University, with concentrations in economics and computer science, and received his law degree with honors from The University of North Carolina. More recently, Vance has attended executive programs at both the Graduate School of Business at Stanford University and Harvard’s Graduate School of Education. Vance is also ITIL® Foundation certified.



HDI Certification and Training

August/September/October Course Schedule

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

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HDI® Support Center Director	3 days	\$2,795 / \$2,895	—	—		14-16 Boston, MA	
Knowledge Management Foundations: KCS SM Principles	3 days	\$1,495 / \$1,595	—	—	5-7 Chicago, IL	1-3 Irvine, CA 14-16 Boston, MA	
ITIL® v3 Foundation	3 days	\$1,495 / \$1,595	14-18 hours	\$495 / \$545	3-5 Omaha, NE 12-14 Irvine, CA 12-14 New York, NY 26-28 Arlington, VA	2-4 Atlanta, GA 30-Oct. 2 Indianapolis, IN	21-23 Dallas, TX 28-30 Chicago, IL

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Incident Management	1 day	\$595 / \$645	6 hours	\$545 / \$595	11-13 Online, Virtual		20-22 Virtual
Change Management	1 day	\$595 / \$645	6 hours	\$545 / \$595		29-Oct. 1 Virtual	
Configuration Management (SACM)	1 day	\$595 / \$645	6 hours	\$545 / \$595		29-Oct. 1 Virtual	
ITIL®: Planning to Implement	1 day	\$595 / \$645	6 hours	\$545 / \$595		17 Boston, MA / 22-24 Virtual	6-8 Virtual
Problem Management	1 day	\$595 / \$645	6 hours	\$545 / \$595	11-13 Online, Virtual	17 Boston, MA / 22-24 Virtual	20-22 Virtual
Service Level Management	1 day	\$595 / \$645	6 hours	\$545 / \$595			6-8 Virtual

Three Ways to Register

Visit: www.ThinkHDI.com/courses



Call: 1.800.248.5667



Email: Register@ThinkHDI.com

HDI Customer Satisfaction Index— User Group Formed

A User Group has been formed to evaluate and discuss possible changes and ideas in an effort to evolve the current Customer Satisfaction Index service. Several meetings have already taken place and changes have been implemented in response to the group's feedback. The User Group will continue to meet and look at ways to improve interaction and reporting through the index.

The Customer Satisfaction Index is a secure web-based service available through HDI, which measures and benchmarks customer satisfaction ratings.

Designed specifically for the IT support industry, this service:

- Benchmarks your performance against your established goals, other companies in your industry, or against the support industry as a whole.
- Creates historical statistics by analyst, including graphing, raw data, and links to customer comments.
- Increases customer response rates.
- Saves you time with turnkey reports.
- Alerts your team when a customer responds unfavorably.

To learn more about the Customer Satisfaction Index please call **800-246-5667** or visit the HDI Web site at www.ThinkHDI.com/services.



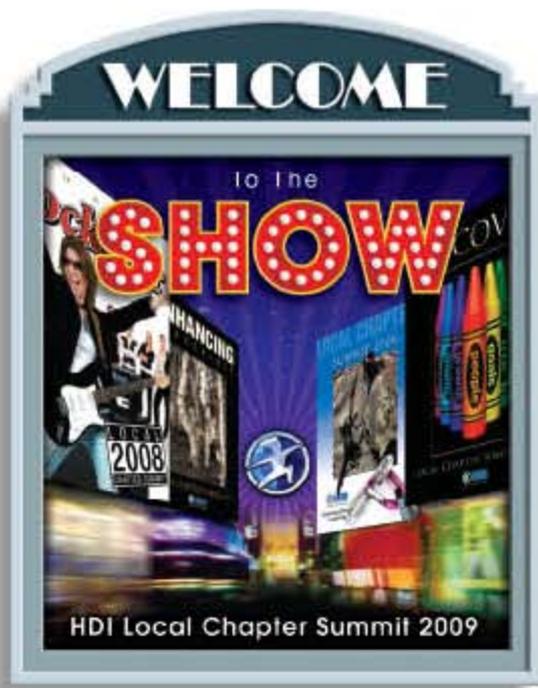
HDI Forums Connect in June

HDI Forums are strategic groups of leaders who meet several times per year to network, exchange ideas, discuss support center issues and challenges, and share benchmarking ideas with peers who work in similar industries or share similar responsibilities.

Six forums meet during the month of June: Government, Healthcare Providers, ITIL, Law, Retail, and Support Center Leadership. A variety of topics were discussed including ITIL implementation, Service Level Agreements, Incident and Knowledge Management, Problem Management, outsourcing, and more.

Forum members experienced live tours of nearby support centers and were shown case studies featuring organizations in their vertical markets. The Government Forum visited the Navy Marine Corps Internet in San Diego with an afternoon tour of the facility and in-depth look at their support center. The Healthcare Providers Forum visited Sharp Healthcare touring the hospital and data center, and meeting their IS team. Case studies covered areas such as outsourcing, Incident Management, and Problem Management.

For more information about HDI's forums, please call **800-248-5667** or e-mail Leslie Cook at lcook@ThinkHDI.com.



Colorado Springs, CO—HDI 2009 Local Chapter Summit

The annual Local Chapter Officers Summit took place in Colorado Springs on June 12-14, bringing together 116 officers (including 48 new faces) for three days of networking, training, awards, and announcements.

The theme this year was “Welcome to the Show...” with officers collaborating on the best ways to gather ideas, data, and information together in order to amalgamate it and produce content. Another group think focused on communication and delivery within and amongst chapters with a focus on social networking sites. Chapter officers see social networking on the rise and are excited and geared to utilize social networking venues as a way to reach out to members, increase communication, and create additional connections within chapters.

Brenda Iniguez’s keynote presentation focused on “Synergizing the Generations” and brought to light the differing generations in our workplaces and in our local chapters. Varying age groups present different ways of approaching and dealing with many aspects of an organization, including leadership, communication, and problem solving. Brenda explored how to do this and discussions following brought forth ideas on student chapters, student memberships, and student involvement as one of the new things local chapters and HDI will be working on together to bring generations together.

Announcements and Awards:

Officer’s welcomed Dan Wilson as the new *HDI Member Advisory Board Chairman*. Dan is the local chapter president for the Detroit, MI Motown Local Chapter and works at Volkswagen of America.

The Rising Star Award went to the newly reactivated Heartland, Kansas City Local Chapter. This award is given to a chapter that has fallen off and come back, much like the Phoenix rising from the ashes.

The Ducks in a Row Award was awarded to the Gateway St. Louis Local Chapter. This award represents the chapter that has it all together, doing all the things that make them a chapter of excellence.

The Rock of Our Foundation Award winner was Cynthia Monroe, San Diego Local Chapter President and now VP of Membership. The winner of this award is considered to be an individual who has dedicated time, energy, and support to HDI overall. This is a person who steps up to volunteer outside of their normal position as an officer, someone who HDI relies on for committee work, judging for awards, support for leadership, etc.

If you would like to become involved or attend an HDI Local Chapter meeting in your area, please visit the HDI Web site at www.ThinkHDI.com for more information or call 800-248-5667.

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