HDI 2009 Trip Report

Generations at Work Series:
Hiring and Training Multiple Generations

Strategy

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HDI Members and SupportWorld Readers,

I recently returned from the HDI 2009 Conference and Expo in Las Vegas that took place in April. As always, it was a pleasure reconnecting with many of you and meeting some of you for the first time. Every year I return invigorated and inspired by the enthusiasm and passion all of you show for our industry and for HDI—this year was no different. I have once again returned feeling refreshed and excited about what is going on in the support industry and what the future will bring.

Numerous awards were presented at the conference and I congratulate all of the local chapters, organizations, and people who participated and received these; it’s an honor to be able to work with and recognize those who give so much to our industry. I’ve included highlights of the HDI awards throughout the magazine along with a complete trip report with pictures and descriptions of some of the memorable moments at this year’s conference.

One thing I continue to notice at our annual conference is the generational gap within our audience. This gap grows and morphs every year…I see people who appear to be right out of college, as well as those who have been in the support industry for many years. What effect does this have on our organizations? A cross-generational workforce can make it tough for support managers and support organizations to run smoothly; these employees think and act with different sets of values, cultures, and work ethics. Bob Last, in his “Generation at Work” series, continues to explore the multi-generational workforce in his article on page 10, “Hiring and Training Multiple Generations.”

This issue’s feature article is written by HDI Higher Education Forum member Mark Fitzgerald and Shad Jesson, who share with us their journey on becoming a University Help Desk of Distinction. By continuously improving processes, alignment, and communication the Boise State University Help Desk is a prime example of how to revamp your current support center functions to better align yourself to the business, become a valued asset, maintain ownership and responsibility, and challenge your organizations to continually raise the bar for improvement. Their four principles are an excellent guide to bring you closer to becoming your own Help Desk of Distinction.

I would love to hear about your personal experiences within your support organizations. Please send your thoughts, comments, articles, and ideas to jneider@ThinkHDI.com.

Best Regards,

Julie Neider
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On April 6-9, HDI hosted its annual conference and expo in Las Vegas. This leading event for service and support professionals brought together people from all corners of the world at the beautiful Mandalay Bay resort to:

- provide a showcase of learning—featuring some of the best speakers and keynotes in the industry;
- celebrate industry achievements—awarding people, organizations, and local chapters for their dedication and excellence;
- promote connection—inspiring networking with peers who share similar work experiences, career paths, and interests; and
- plug into the latest technology—showcasing the best technology vendors in the business.

Throughout the conference, HDI hosted a variety of meetings for special groups. The HDI Higher Education Forum (HEF) group met at the Nevada System of Higher Education on the UNLV campus on April 5, 2009. Local Chapter Officers met to celebrate their outstanding dedication and performance through the HDI Local Chapter’s “Circle of Excellence.” And finally, HDI offered an Executive Connections Package for senior executives.

The Kick-Off
After two days of preconference workshops, anticipation and excitement peaked as the event kicked off with a glimpse into the magical world of the remarkable duo Penn & Teller. While the legendary Vegas performers kept the show “clean,” it was an interesting and mind provoking performance that revealed many of their magic “secrets” with clever observations thrown in during the exhibition.
It was another top tier act chosen by the HDI Events team to keep the customer experience in line with expectations from past HDI conferences, even in a difficult economy. Throughout the conference, there was no evidence of any reductions in quality and the overwhelming response to the conference experience was, “Outstanding conference; again!”

The celebration continued Monday night with a reception in the Expo Hall, where attendees were welcomed by vendors and given a first look at the industry’s newest products and services while they enjoyed food, drinks, and networking with peers. Throughout the conference, exhibitors unveiled new products, enticed attendees with product demonstrations, and stamped cards for the “Expo Prize Giveaway.”

Tuesday’s morning general session featured internationally known world economist, Todd Buchholz. He gave excellent examples of why there should be optimism for an improving economy by third quarter this year—if politicians would just let everything be, now that they have secured some of the financial industry fundamentals. His presentation was titled “Thriving in a Chaotic Economy.” Many attendees seemed very welcoming of the good news and many shared the view that the IT industry in particular, is positioned to rebound on the front edge of a recovery rather than at the tail end of an economic recovery. Here’s hoping!

Fully charged with “bites” and a positive outcome for the economy, attendees broke off to attend their first full day of sessions. With more than 100 available to choose from and a wide range of topic areas available such as ITIL®, support strategy, metrics, customer service, technology, and more, sessions proved appealing to everyone; from the veteran IT support manager to the newest member of the service desk.

Tuesday afternoon featured Dr. Robert Ballard, scientist, oceanographer, and Titanic discoverer who presented, “Living the Dream.” He brought the house down with his discoveries, teachings about the world we never think about below the surface of the ocean, the impact of IT on his life as an explorer, and his wonderful institute dedicated to creating a passion for learning in our children.
The HDI 2009 Trip Report:

The journey was fascinating as he took us along the ridge of the largest mountain range in the world. That’s right; there is a mountain range under the sea! His development of underwater robots assisting in his exploration was a testament of how far technology reaches throughout our culture and businesses. You would think the highlight of the presentation would be his discovery of the Titanic but it actually was his description and passion for his Academy of Achievement. His academy connects the lives of our youth with the leaders of our time to build a passion for learning and life!

Many attendees left the presentation with ideas for the next greatest business idea in the technology industry. He definitely was optimistic about the future of technology, which for an audience that spends its time supporting technology was great news for future career prospects!

A New Day—Education, Networking, and Fun

Wednesday morning, following a new round of Breakfast Brain Bites, attendees crowded the general hall for the opening general session with Daniel Burrus, Technology Futurist. Daniel treated us with a glimpse into the future, making the future of technology look less blurry. He believes that the future is much more predictable than we believe, especially when it comes to technology trends. He challenged the audience with questions like; do you believe the use of social media is on the incline or decline? With the expansion of accessible bandwidth and increased computing ability; will video and television streaming be on the increase or decrease? He argued that you just have to look at mobile technology and its adoption to understand there will be a huge demand for programs that work with mobile devices.

Attendees spread out after Wednesday’s opening keynote, filling the remainder of the day with breakout sessions and lunch in the Expo Hall. During the last three days and especially after lunch on Wednesday, attendees eagerly gathered stamps from exhibitors in anticipation of winning one of many great prizes at the Expo Prize Giveaway. On Wednesday afternoon, participants flooded the Expo Hall for a shot at winning an ipod, a giftcard, a wii game console, a flip video camcorder, or one of many other great prizes.

The afternoon general session leading up to the beach party was headlined by Patricia Russell McCloud, author of “A is for Attitude—Alphabet for Living,” presenting “Mountain Get Out of My Way.” She was a passionate advocate for taking control of our destiny and letting nothing stand in our way. She engaged the audience with a tone that can only be described as Amen! It was as if she was at the pulpit of life offering up encouragement and direction for a successful and engaging life journey.
Wednesday evening, HDI hosted a beach party—bringing the industry together for a night of chatting, dancing, and fun. After jam-packed days of sessions, keynotes, and browsing the expo hall, attendees were ready to let their hair down, throw on some Bermuda shorts, and cut loose! While enjoying an array of tropical cuisine and umbrella drinks, attendees danced it up barefoot on the white sandy beach, played beach bingo for cash prizes, got a tattoo, or had their palm read.

Nothing Lasts Forever
The closing keynote on Thursday was none other than Coach Ken Carter, the real life coach whose life was made into a movie starring Samuel Jackson; if you have ever seen Coach Carter speak you wonder why he didn't play himself in the movie! He is the real deal. A passionate speaker that roamed the audience shaking everyone's hand; twice! He energized the audience that had spent four days learning and networking, and created an atmosphere as if it were opening day. No one left and the room was packed.

Coach Ken Carter's story is as inspirational as he was as a keynote speaker. “Average is Just Not Good Enough; Period!” was the title of his presentation and there was nothing average about the closing to the HDI Conference! Coach Carter signed DVDs with all proceeds going to his foundation for at risk kids, and the line for his autograph and DVD was a mile long; almost! Attendees left the conference on a great note and it was sad to see it end.

Even though the tone in the “outside” world was tentative due to the economy, there was no sign of it in the halls, classes, and general session rooms of the HDI Conference in Mandalay Bay Las Vegas. The Events team headed up by Fiona Henderson have raised the bar again this year with another outstanding event! They deserve kudos for this year but I don't envy their challenge to top this experience next year in Orlando!
RON MUNS LIFETIME ACHIEVEMENT AWARD

— Malcolm Fry —

In honor of Ron Muns and his impact on the service and support industry, this award, created last year and awarded yearly, recognizes luminaries in the industry for their contributions, enthusiasm, and tireless efforts to the advancement of our industry.

Representing Help Desk BC Local Chapter, Canadian Region Company, Worksafe BC, Vancouver, BC

The annual HDI Analyst of the Year Award is a global program that rewards the industry’s best first-level support analysts. Regional winners compete for the national award, which is proudly sponsored by Robert Half Technology.

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The organizations and businesses that will be successful in the twenty-first century will be those that hire and train good people quickly and efficiently. Granted, the U.S. and world economies at the time of this writing (April 2009), make the job market an employer’s market, but balance between employees and employers will eventually return and sooner or later, the Baby Boomers will exit the workplace making it the domain of Generations X and Y.

In the meantime, the Baby Boomers (born 1943 to 1960), Gen X (1961-1981), and Gen Y (born after 1982) will all be working together, albeit, sometimes tensely. The Baby Boomers are perceived as self-absorbed workaholics; Generation X as whiners, and Generation Y as arrogant and entitled; won’t the office be a fun place to work? One of the ways to make sense of this amalgamation of generations is to treat them all equally while simultaneously respecting their differences.

**Things To Consider in Hiring Multiple Generations**

Provide a value proposition for employees; it is amazing how many organizations believe that they offer the greatest work experience in the world without any proof; Generation X and Y want proof of this assertion. If you have any hope of hiring the people you want and need, you will have to explain to potential hires what their jobs will be like; what does your company or organization offer that is unique? What do you do if you are recruiting more than one generation? You have to be willing to build a culture and organization that appeals to more than one generation’s value proposition.

Be specific during the hiring process about the mundane aspects of organizational life that are rarely discussed, but quickly become important, such as:

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TECHNOLOGY

**GENERATION X**
Keep it up-to-date and motivating; music at work, BlackBerrys, IM, and fast computers will help Generation X stay productive.

**GENERATION Y**
Encourage suggestions and do not fear change. Gen Y is more comfortable with technology than any other group. Learn from them and stay on the cutting edge.

WORKPLACE GOSSIP

**GENERATION X**
Be direct and let them know that you understand their concerns; e.g., “I get it, you think Bob is an idiot. Might want to keep that to yourself though.”

**GENERATION Y**
Be subtle (as good coaches and teachers sometimes are). Say something like, “True, Bob doesn’t know much about search marketing, but you don’t how good he is at negotiating a deal or managing customer expectations when there is a problem.” Sometimes the exuberance of youth can be annoying, but that is why armies have sergeants and organizations have supervisors—to teach and lead.

ATTIRE

**GENERATION X**
If you have a dress code in your organization, explain it to candidates during the interview process, candor is good for everyone.

**GENERATION Y**
They are new to the job market and despite the efforts of their university’s career services department, they are likely oblivious to the concept and requirements of company culture, including a dress code. If you do not have a dress code in your organization, you cannot blame them for dressing like they are still in college, so set clear expectations about what is acceptable and what is not.²

Hire quickly, “...if an employer doesn’t call top candidates within seventy-two hours, it probably shouldn’t bother.” “Delays can telegraph the idea that you’re not interested in the candidate or that you’re a slow-moving bureaucrat.”³ In addition, “…train managers and recruiters not just on the benefits that are available, but on how those benefits might be perceived by each generation. Only then can they be fully armed and ready to persuade the generations to come on board.”⁴

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² URL: http://www.businessweek.com/magazine/content/08_34/b4097063805619.htm.
⁴ Ibid, 168-169.

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**THINGS TO CONSIDER WHEN TRAINING MULTIPLE GENERATIONS**

…there is no such thing as some special way to teach a particular generation of people.⁵

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⁵ ASTD Discussion Board, Posted by Fanatic Facilitator, 26 August 2007. URL: http://community.astd.org/eve/forums/a/tpc/f/5401062/m/71310114.
Tiger Woods, Robert Downey Jr., Leonardo DiCaprio, and Jennifer Anniston are Generation X’ers.

SIXTY SECONDS OF TRAINING THEORY

How important is training in job performance? “One study indicates that employees who receive formal job training reach ‘standard’ performance levels faster (72 percent faster), generate less waste (70 percent less), and are better at customer troubleshooting (130 percent better) than employees who learn their jobs through the time-honored, but highly inefficient ‘watch Jill for a few hours, and then we’ll turn you loose on customers’ approach.’” That approach is sooo twentieth century!

A basic training program should be able to answer three questions and contain the following elements:

Where should the training program go?
- Purposes
- Goals
- Outcomes
- What will be different at the end of the training?

How will the training program get there?
- Objectives
- Methods
- Steps
- Tools
- Processes
- Techniques

When will the training be successful?
- Evaluation
- Measurement
- Assessment

These questions lead to two principles:

**The Objectives Principle**
People are more likely to accomplish training goals if they are told in understandable terms what those goals are; and

**The Practice Principle**
People are more likely to accomplish objectives if they are given opportunities to practice the behaviors that are specified in the learning objectives.7

These two principles lead to a series of considerations (they are generation-neutral) that should be factored into any training program:

- **Computer-game simulations are replacing training seminars.** For example, Nike Inc.’s stores train their employees by playing a game called “Sports Knowledge Underground,” which ‘mimics a subway system with routes to learning basic sales skills and product information.’”8

- **Build activities into the training program.** UPS used to train its drivers using the infamous “340 methods”—two weeks of LECTURES that covered every aspect of the UPSs rules and routines. This approach to training worked for decades, but when UPS brass realized that “time to proficiency” for drivers had risen from 30 days to 90-180 days, the lectures were replaced with examples of completed tasks, quizzes related to assigned tasks, instant feedback in hard data and video recordings, full-scale simulations, and practice runs.9 This hands-on approach to training is nothing new, the armed services have been doing it for decades and the Federal Bureau of Investigation’s famous “Hogan’s Alley” has been a gunfight-training tool since at least 1956.

- **Online training.** Discussion forums, IM, blogging, and e-mailing are not only expected in training design today, but have become an integral part of the design. “These communication tools allow for collaboration.”10

As one young employee commented, “When my boomer colleagues see me texting, blogging, and using

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7 Train the Trainer, A professional development course taught by Vincent Melograno, Ph.D., Cleveland State University, November 1999.
10 URL: http://trainingpd.suite101.com/article.cfm/designing_training_for_gen_y
wikis, they see it as social,” when in fact, they are “tools I use to achieve higher results by gaining consensus and connecting with others.”11 Hmm, consensus and connection versus dissonance and isolation? These “kids” might be onto something.

Personal and professional development should be built into training. All employees benefit from a greater understanding of their “…own personal strengths and limitations and how to adapt their behavior to get the impact they desire.”12 The days of command and control in an organization are just about over, nurture your workforce and rejoice that you have them. If they are annoying and frustrating sometimes, just remember who will be funding Social Security when you retire!

CONCLUDING THOUGHTS ON GENERATIONS IN THE WORKPLACE

Multiple generations in the workplace are a fact of organizational life that is not going to change for decades and the best leaders will be the ones that “… take advantage of the promise of intergenerational collaboration [or] risk becoming irrelevant and obsolete.”13 Every generation can find characteristics about another generation that they find annoying, frustrating, or even maddening, it is how these emotions are dealt with that will separate successful organizations from mediocre ones. The differences in generations are opportunities for unprecedented success, growth, and satisfaction. These differences will challenge leaders to be creative, involved, and committed to excellence; to do otherwise, is to court mediocrity and that is even worse than failure. Good luck.

The Y Generation
(Jessica Alba and Miley Cyrus)
is the generation that received “Thanks for Participating” trophies.

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

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

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11 URL: http://cio.com/article/print/481320
12 URL: http://cio.com/article/print/149053
13 URL: http://www.deloitte.com/dtt/article/0,1002,cid%253D244990,00.html
The POWER of One in Support Center Staffing

by Penny REYNOLDS

Whether manually created or developed through workforce management systems, once a set of workforce schedules has been carefully devised, it’s critical that your staff sticks to the plan. But one of the hardest things to manage in many support centers is getting agents to adhere to their daily work schedules. Most think, “Hey, there are dozens of other people on the phones now. What possible difference could it make if I just log off a few minutes early for my break? Just one person can’t possibly make that much difference.” Sound familiar?

“Hey, there are dozens of other people on the phones now. What possible difference could it make if I just log off a few minutes early for my break?”

Schedule adherence can be improved in many cases with a little education. Helping your staff understand what impact one individual agent has on service can go a long way in getting them to stick to their planned schedule.
So just what is the impact of a person or two on service? Well, it depends. The impact on service depends largely on two factors: the size of the support center and the current level of service delivery. Obviously, the smaller the support center, the greater the percentage share of workload handled by each person, and therefore the bigger the impact of his/her participation. For example, if we look at call centers with 10, 25, and 50 agents, with all a 30-second average speed of answer (ASA), and then take one agent away, there is obviously a bigger impact on the smaller operations.

<table>
<thead>
<tr>
<th>57 calls/half hour</th>
<th>163 calls/half hour</th>
<th>346 calls/half hour</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 agents</td>
<td>25 agents</td>
<td>50 agents</td>
</tr>
<tr>
<td>30 sec ASA</td>
<td>30 sec ASA</td>
<td>30 sec ASA</td>
</tr>
<tr>
<td>minus one agent:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9 agents</td>
<td>24 agents</td>
<td>49 agents</td>
</tr>
<tr>
<td>83 sec ASA</td>
<td>58 sec ASA</td>
<td>50 sec ASA</td>
</tr>
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Because of the economies of scale of the larger centers, there is greater efficiency in the call handling process, and therefore the impact of one person is not as significant.

The other factor that determines the impact on service of any one single person is the level of service currently being provided. The better the existing level of service, the less the impact of one person, as illustrated below (using the example above of 346 calls per half hour, 240 second average handle time or 46 erlangs)

<table>
<thead>
<tr>
<th>Number of Staff</th>
<th>Average Speed of Answer</th>
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<tbody>
<tr>
<td>54</td>
<td>6 sec</td>
</tr>
<tr>
<td>53</td>
<td>8 sec</td>
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<tr>
<td>52</td>
<td>12 sec</td>
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<td>51</td>
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<td>49</td>
<td>50 sec</td>
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<tr>
<td>48</td>
<td>91 sec</td>
</tr>
<tr>
<td>47</td>
<td>236 sec</td>
</tr>
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Obviously, as staff numbers increase, service improves. As staff numbers decrease, service worsens. Depending on where the support center currently falls in the staffing/service curve, the impact of one person could be minimal (for example, going from 54 to 53 staff worsens ASA by only 2 seconds). On the other end of the spectrum, decreasing staff from 48 to 47 staff handling the same calls would deteriorate service from a 91-second average wait to nearly four minutes!

The good news about the impact of one person on service is that if your center is in a service slump, adding just one more person on the phones can make a tremendous improvement. On the other hand, losing one person in what is already a mediocre or poor service situation can really ruin service for that period of the day.

**Knowledge is Power**

Hopefully, a few charts and graphs illustrating the above staffing/service relationship in your next staff meeting will help enlighten those agents that think their impact on service is insignificant. We’ve found this to be the case in many support centers. Simply educating agents about the effect on service one or two bodies can have will help them understand the importance of schedule adherence and increase their cooperation with the schedule process.

Penny Reynolds is a Founding Partner of The Call Center School, a Nashville, Tennessee based consulting and education company. The company provides a wide range of educational offerings for call center professionals, including traditional classroom courses, web-based seminars, and self-paced e-learning programs. For more information, visit www.thecallcenterschool.com or call 615-812-8400.
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<th>Position</th>
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<td>BC</td>
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<td>Clare Agapayev</td>
<td>President</td>
<td><a href="mailto:canapayev@diernsystems.com">canapayev@diernsystems.com</a></td>
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<td>250-978-8463</td>
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<td>President</td>
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HDI Local Chapters Receive Top Honors at HDI 2009 Conference and Expo

Local Chapter Officers recently met in Las Vegas at the HDI Annual Conference and Expo to celebrate their outstanding dedication and performance through the HDI Local Chapter’s “Circle of Excellence.” All chapters have the potential of reaching a “Circle of Excellence,” with three levels of excellence to work towards. More than 47 chapters participated this year with judging taking place around four major categories:

- Chapter Growth
- Chapter Management
- Chapter Education/Career Development
- Chapter Professional Development and Contributions

Congratulations to these local chapters on achieving a “Circle of Excellence!”

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<th>Platinum</th>
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<th>Silver</th>
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<td>South Carolina</td>
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HDI has more than 60 local chapters in the United States and Canada. Local chapter membership is a valuable member benefit because it provides an easy way to stay connected with other HDI members in your region. For more information on the “Circle of Excellence” criteria and for information on joining or forming a local chapter, please contact Sophie Klossner at (719) 268-0306 or e-mail her at sklossner@ThinkHDI.com.
OK, but what do I do Monday morning?” The Information Technology Infrastructure Library, ITIL, like many process improvement programs is large, not overweight, but very encompassing. The difficulty many organizations face is not reading the books…or believing that ITIL can produce organization-wide benefits but in determining when, where, and how, to start. In other words, “What do I do Monday morning?” This article presents one methodology that answers the question of “What do I do Monday morning?”

This methodology was built using the core concepts of ITIL as well as concepts from W. Edwards Deming’s Plan-Do-Check-Act cycle, Six Sigma’s DMAIC process improvement methodology, and ISACA’s COBIT. It is designed to make the ITIL framework realizable in an organization by dissecting each “process improvement cycle” into four phases. Each phase consists of a number of steps and steps consist of activities. Activities have deliverables, usually in the form of documents. The methodology is tangible as opposed to theoretical, and if done properly, auditable.

Phase I—Establish Process Direction

The first phase of the methodology evaluates the reason for the process in the first place and its value to the business. The means to determine the current and ongoing value of the process are determined and agreed upon. Current valuations are applied and compared to industry standards. A list of possible directions for the process is built and prioritized and the possibilities are outlined.
Realizing the **Benefits of ITIL®**

by Greg HINES and Tim MARTIN

Process goals and measurements are determined here as well, building in the needed process governance. Finally, quick wins may be identified and implemented, giving immediate value.

It is a natural tendency at this phase to “cut to the chase,” to spend little time and effort on Phase I and move on to “Implementation”—Phase II. It is important to point out that after the initial cycle through the framework, when process improvements have been made and metrics analyzed by senior management, it will become evident how much attention was given to gaining agreement on process direction. The management agreement and actual sign-off of the metrics, designed to measure how well the process is meeting its intended goals, is a critical success factor found in Phase III.

**Phase II—Implement Process Changes**

The second phase of the methodology is where the work gets done: designing and implementing the process changes identified in Phase I. Because these process changes can be extremely variable, there are a large number of possible activities to be performed. Regardless of the number of activities, it is essential to have a project charter written and approved, a project plan developed and resourced, and a project communications plan authored and agreed upon.

Phase II, step four of the methodology is, arguably, the most involved step of the methodology. It is in this step where policies are established, processes are designed and documented and procedures written. Step four is the precursor to the very important training to be delivered for the process and the use of the service management tool.

**Phase III—Analyze Process Metrics**

After the large “push” of Phase II, there is a period of “lull.” The process is applied, hopefully as designed. Measurements are taken to determine whether the process improvement effort has achieved its goals…and whether or not the process is furthering the goals of the business. It is important to always realize that these efforts are about the alignment of IT with the business. At the same time, it is helpful to compare to other IT service providers, both inside and outside of, an organization’s core industry.

**Phase IV—Identify Process Improvement Opportunities**

The final phase of the ITSM SBS methodology builds a portfolio of process improvement opportunities. This phase considers external factors such as changes in the business environment and changes in technology that may have occurred since the initial phase of the implementation.
At this point, one pass through the process improvement cycle has been completed. Going forward, the cycle is started all over again by validating the mission and goal of the process, authenticating the measurements used to monitor the process and so forth. This “loop back” capability of the methodology permits for continuous improvement to take place, but not in a vacuum. The dynamics of an ever-changing business, legal, and technological landscape are constantly being considered. This consideration enables the process to take an optimal, but adjusting, form within the organization.

**Gaining Buy-In**

The big “mountain to climb” when implementing new or changed processes is gaining buy-in from both the IT “perform” staff and the decision makers, IT senior management. This methodology works to get buy-in through the use of working groups and a steering group. The members of the groups are critical to the success of the process improvement effort.

Working groups consist of the IT “perform” staff. The staff members should be knowledgeable in the process being improved either by being an active performer or the manager of a team that is active in the process. All process deliverables are agreed to by the working group. The members of the groups are critical to the adoption of the process and concepts of service management since they will have knowledge of the rationale of the decisions behind the process design. For instance, why the process is designed the way it is for their organization. Working group contributors will continue to be ambassadors to and mentors of staff that will use the processes. Experience has shown that working group members play a large part in the acceptance, or lack thereof, of the processes by IT staff and management.

The steering group gives guidance, advice and, finally, approval to each of the deliverables produced by the working group. The steering group consists of senior IT management. This group should encompass all areas of IT from security to project management to application development, technical management, and operations. A regularly convened meeting of the steering group has multiple benefits. Goals and anticipated benefits of each process and overall service management are kept in front of decision making IT senior staff, maintaining upper management support and warding off stalled momentum. Resource allocations, the initiation of additional ITSM processes or needed modifications of the service management initiative are reviewed in the steering group forum to insure alignment with the overall goals.

**Roles**

The ITSM SBS methodology, both by its overall design and in the delineation of each of the Phase I-IV Steps’ deliverables, implies a specific set of roles or actors. Depending upon an organization’s size and resource availability, several roles may be combined and fulfilled by an individual.

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Owner</td>
<td>is accountable for the quality of the process and its improvement, ensures that a process meets its objectives.</td>
</tr>
<tr>
<td>Process Manager</td>
<td>is responsible for the planning, coordination, monitoring, and reporting of the process.</td>
</tr>
<tr>
<td>Project Manager</td>
<td>creates and manages a coordinated project plan. (Whether an organization can afford a project manager per process or an overall project manager for the ITSM improvement initiative, it is invaluable to the success of the effort to have a qualified individual in this role.)</td>
</tr>
<tr>
<td>Service Delivery Manager</td>
<td>acts as an ITSM advocate to senior IT and business management, champions the ITSM effort, unifies the Process Owners/Managers and assists in the integration of various processes to leverage the synergy and realize the benefits of the overall ITSM improvement initiative to the organization. (The Service Delivery Manager has a key role in the steering group.)</td>
</tr>
</tbody>
</table>
Each role is implied or prescribed in the ITSM SBS methodology to be successful in the overall effort.

Process Maturity Assessment

One additional component of the methodology which is important, but not always necessary is an assessment of the process (or processes). An assessment is used to monitor the maturity of the process(es) over a longer period of time, perhaps every eighteen to twenty-four months. This assessment is based upon ISO 15504, the concepts of SEI’s Capability Maturity Model for Services (CMMi-SVC), SERC’s IT Service Capability Maturity Model (ITSCMM), ITIL v3’s process maturity framework (PMF) and COBIT’s process maturity models. It is, however, designed to measure the maturity of a single process, without considering the synergies that the ITIL processes have when used together. If more than one process is being assessed, the assessment methodology is applied to each process.

This assessment can be informal where questionnaires are the basis for determining maturity, or it can be formal, like an audit, where evidence is gathered to prove the maturity of the process. The maturity is measured on a one to five scale where one is the least mature and five is the most mature. Gaining a level of maturity takes time and should not be a goal, in and of itself. It can be useful, however, to validate that a process is maturing. A maturing process adds more value to the business at less cost.

Where ITIL leaves off, that is, where the books stop, the ITSM SBS methodology starts. The hand off is important as ITSM SBS provides the step-by-step instructions that make realizing the benefits of ITIL’s IT best practices possible.

Greg Hines is an independent IT service management consultant and trainer.

Tim Martin is the Assistant Administrator—Customer Service with the Ohio Department of Taxation.
Why a Centralized Support Model Makes Sense for Support Centers

by Robert LAST
Quality in a service or product is not what you put into it. It is what the client or customer gets out of it.

— Peter Drucker —

One of the enduring challenges many support managers face is to determine what type of IT support structure is “best” for an organization with offices across the world. After much work you have determined that you will recommend a centralized support model; that was the easy part, now you have to justify and defend your choice. As an example, we will use a law firm with offices across the world. Let us assume that you are the managing partner of the firm Alba, Joyce, Frilow and Henderson; it is a large firm with multiple offices distributed across the world. The management committee has directed you to recommend what support model would be “best” for your firm. The firm has twenty-nine offices, fourteen in the United States, seven in Europe, seven in Asia, and one in San Paulo, Brazil. Sixteen of the offices use English as their primary language and thirteen use English as a second language. After much review, thought, and discussion, you will recommend that a centralized support model be adopted. This article will discuss some of the factors involved in making such a determination.
“Motivated by customer demand, the desire to streamline business processes and a mandate to reduce costs, help desks are working diligently to deliver a wider range of value-added services.”

Centralized Support

As the name suggests, centralized support involves most support functions being managed from a central location; the only exception being physical activities such as I/M/A/C (Install/Move/Add/Change), everything else requires a user to call and contact a central support center. The objections to a centralized model usually consist of the following:

<table>
<thead>
<tr>
<th>Objection</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>The service will not be as good.</td>
<td>Good service is a training and leadership task that can be ensured by a focus on training and execution.</td>
</tr>
<tr>
<td>The service will not be personal.</td>
<td>I/M/A/C work will need to be done locally; all other aspects of service and support can be identified and delivered with a “personal touch” by using good customer service basics and extensive profiles, e.g., Lands’ End and Victoria’s Secret.</td>
</tr>
<tr>
<td>Employees for whom English is a second language will be at a disadvantage when calling for support.</td>
<td>Multiple-language support centers have been successfully implemented for years, they require some creative staffing and scheduling to be successful.</td>
</tr>
</tbody>
</table>

The critical success factors in a centralized support model are the same factors that any support manager will implement; a customer-focused culture, a sophisticated service infrastructure that consists of service level agreements (SLAs), operating level agreements (OLAs), and standard operating procedures (SOPs), good training/quality control for the centralized operation, careful analysis of incidents and problems, and the development and use of good knowledge management practices and tools. Granted, convincing users that a centralized service model will be to their benefit can be a challenge, but a well-planned support operation, excellent service, and an extensive marketing campaign (and good leadership) can quickly win over skeptical users. As with most undertakings, the devil is in the details.

It is also a good idea to candidly discuss the cost savings that will be realized in a centralized support model; employees frequently appreciate being treated like adults and professionals. For example, a discussion of the data in Table 1-Results of a Centralized Support Model, can be a useful tool for managers in explaining the value of a centralized support structure.
IS YOUR DATA RECOVERY SOLUTION A DATA SECURITY PROBLEM?

Your facility is secure. Your network is safe. Your data is encrypted. But, what happens when a drive fails, and must leave your facility for data recovery?

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DriveSavers meets the most stringent security requirements mandated by corporations and government agencies today. Our facility, network and data hosting controls have been audited and are certified SAS 70 Type II compliant. Our engineers are trained and certified to safely recover encrypted data. Since 1985, we have maintained the highest recovery success rates on every laptop, multi-disk drive, portable device and operating system ever made. Our Data Recovery Advisors are available to support you every hour of the day, every day of the year.

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 Protect your data from unwanted breach during the data recovery process.

Call DriveSavers. (800) 440-1904

The fastest, most reliable and only certified secure solution to your data loss problems.
<table>
<thead>
<tr>
<th>Pre-Consolidation</th>
<th>Site A</th>
<th>Site B</th>
<th>Site C</th>
<th>Site D</th>
<th>Total/Avg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Budget</td>
<td>$800,000</td>
<td>$1,100,000</td>
<td>$400,000</td>
<td>$700,000</td>
<td>$3,000,000</td>
</tr>
<tr>
<td>Monthly Volume</td>
<td>2,200</td>
<td>5,100</td>
<td>1,600</td>
<td>6,400</td>
<td>15,300</td>
</tr>
<tr>
<td># Managers</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td># Professionals</td>
<td>10</td>
<td>11</td>
<td>3</td>
<td>10</td>
<td>34</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Critical Success Factors</th>
<th>Site A</th>
<th>Site B</th>
<th>Site C</th>
<th>Site D</th>
<th>Total/Avg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Satisfaction</td>
<td>Good</td>
<td>Poor</td>
<td>Fair</td>
<td>Good</td>
<td></td>
</tr>
<tr>
<td>First Contact Resolution</td>
<td>70%</td>
<td>70%</td>
<td>55%</td>
<td>67%</td>
<td>67%</td>
</tr>
<tr>
<td>Professional Utilization</td>
<td>42%</td>
<td>61%</td>
<td>46%</td>
<td>55%</td>
<td>54%</td>
</tr>
<tr>
<td>ASA (seconds)</td>
<td>240</td>
<td>6</td>
<td>24</td>
<td>15</td>
<td>45</td>
</tr>
<tr>
<td>Abandon Rate</td>
<td>15%</td>
<td>8%</td>
<td>9%</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Cost/Contact</td>
<td>$30.30</td>
<td>$17.97</td>
<td>$20.83</td>
<td>$9.11</td>
<td>$16.34</td>
</tr>
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</table>

All results are positive in the consolidated Support Center!

<table>
<thead>
<tr>
<th>Post-Consolidation</th>
<th>Consol Site</th>
<th>Change</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Budget</td>
<td>$2,200,000</td>
<td>$800,000</td>
<td>27% decrease</td>
</tr>
<tr>
<td>Monthly Volume</td>
<td>18,500</td>
<td>3,200</td>
<td>21% increase</td>
</tr>
<tr>
<td># Managers</td>
<td>1</td>
<td>3</td>
<td>75% decrease</td>
</tr>
<tr>
<td># Professionals</td>
<td>28</td>
<td>6</td>
<td>18% decrease</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Critical Success Factors</th>
<th>Consolidated Site</th>
<th>Change</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Satisfaction</td>
<td>Excellent 73%</td>
<td></td>
<td>much improved</td>
</tr>
<tr>
<td>First Contact Resolution</td>
<td>63%</td>
<td>9%</td>
<td>improved</td>
</tr>
<tr>
<td>Professional Utilization</td>
<td>17</td>
<td>28</td>
<td>16% increase</td>
</tr>
<tr>
<td>ASA (seconds)</td>
<td>17</td>
<td>28</td>
<td>62% increase</td>
</tr>
<tr>
<td>Abandon Rate</td>
<td>2%</td>
<td>6%</td>
<td>76% decrease</td>
</tr>
<tr>
<td>Cost/Contact</td>
<td>9.91</td>
<td>6.43</td>
<td>39% decrease</td>
</tr>
</tbody>
</table>

Investment in Professional Outside Assistance $190,000
Return on Investment Timeframe <3 Months

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1. Averages are listed in italics.
2. Definitions were all different, so the average, while calculated, was not meaningful.
3. Common definition—resolution provided on first call in ten minutes or less.

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Rules for a Successful Implementation of a Centralized Support Operation

1. **Understand the reason(s) for the consolidation:** they should be clear, documented, measurable, and realistic. Document a Return on Investment (ROI) for the consolidation.

2. **Identify deliverables for the assessment phase** of the project; one of those deliverables should be descriptions of the strengths, and weaknesses of each support organization, and an understanding of the following elements and answers to these questions:
   
   a) **Support Technology**: Can the existing systems be leveraged or will one or both of them need to be replaced?
   
   b) **Roles and Responsibilities**: Are there duplicates? Are new job descriptions required?
   
   c) **Performance Measurements**: Are the targets going to change?
   
   d) **Processes and Procedures**: Do these processes and procedures need to be changed? Are refinements possible?
   
   e) **Products/Services**: How will the consolidation affect the current scope of service?
   
   f) **Clients/Customers**: Are the clients/customers the same? Are there more or less customers? Are their tech profiles similar or different?

3. **Understand the people, processes, and technology** in each support operation, how they work now, and how they are likely to change.

4. **Identify the critical success factors for the project**: they will be different from one project to another.

5. **Collaborate with all parties**: the less surprises, the better.

6. **Create a measurable plan** that is linked to a timeframe; the characteristics of a measurable plan are:
   
   a) Logical organization
   
   b) Measurable tasks
   
   c) Identifiable milestones
   
   d) Clear roles and responsibilities, and
   
   e) A realistic timeframe.

7. **Review the plan** for intellectual honesty, workability, commonsense, and good project management principles. The reviewers should have objectivity, intellectual honesty, and no stake in the project’s outcome. With these characteristics as a guide, the outline of a support center/help desk consolidation project plan will look like the example provided.

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**How to Handle Culture, Motivation, and Language**

A decade ago, Malcolm Fry, HDI’s 2009 Lifetime Achievement Award winner, wrote a seminal paper on global support that discussed some of the challenges that support managers need to consider when managing a global support operation. They are:
Culture and Language

“Culture and language are among the first issues raised when the subject of global support is discussed and, although important, are given too much emphasis. In many cases the real culture and language issue relates more to corporate processes than international factors. For example, if it is required that a whole corporation speaks English then obviously the problem of language support is not as great. Culture and language are more likely to be an issue for a company providing global support to external customers, e.g. e-commerce, than a company providing global support to corporate employees. Corporate employees can be trained, expected to speak a common language, follow corporate rules, and understand the corporate culture. Whereas external customers are totally unpredictable and sometimes are just looking for an opportunity to use culture and language to create confrontation. It’s amazing what people will do for a discount or their money back! Therefore the first step towards solving the language and culture problem is to clearly identify the customer base. Then issues such as language, support and cultural processes can be considered. One of the main reasons that ‘Chasing the Sun,’ (having global support centers on each continent) is popular is that the language and cultural issues are automatically reduced by having support centers on different continents.

Cultural Motivational Factors

Motivating global support staff around the world can provide a surprising challenge. In the ideal world, all of the global support staff would be treated exactly the same, but this is not possible. For example, support center staff in the USA will get two weeks vacation and be salary orientated, whereas in Europe, support center staff will get four to five weeks vacation and, although would like high salaries, are more likely to be responsive to paternal motivation. Also de-motivation can be very easy, for example, not understanding the prayer requirements of some religions. So you need to understand both the cultural motivators and de-motivators if you are to build harmonious global support. Although not necessarily cultural based there may be some resentment directed towards the headquarter’s global support center, i.e. more promotional opportunities, autocratic decisions, and a superior attitude. Sometimes these can be interpreted as cultural issues when in fact they are corporate issues. A manager cannot manage multiple global support centers by remote control.

Linguistic and Translation

Multiple language support is obviously a serious concern because not only is the number of languages a problem but also the number of agents required to support each language. Add to this the fact that college or university fluency is not the same as colloquial fluency and the problem becomes more challenging. This problem applies even more to translation, often reading instructions translated from another language can be a great source of amusement. Well, the same applies to badly translated technical documents, they can be either amusing or downright impossible to understand. It is important to see spoken language and translations as different components and not assume that technicians or support agents are competent to perform technical translations.”

Final Thoughts

Centralized support operations may not be for every firm, but for most it will make sense, it will be cost-effective, and it will follow the trend of consolidating support operations. Consultant and author Donna Knapp correctly stated, “The consolidation of support services is a strong trend in the support services industry. Motivated by customer demand, the desire to streamline business processes and a mandate to reduce costs, help desks are working diligently to deliver a wider range of value-added services.”


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Log-on today and take your place among the stars! It takes most cast members about 30 minutes to complete the survey.

HDI records industry trends in these areas:
★ Salaries
★ Customer satisfaction ratings
★ Performance metrics
★ Outsourcing
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Complete the survey by July 31st and enter to win a 52” Samsung LCD TV!

*One entry per individual and/or IP address. No co-sponsors and/or multiple submissions will be allowed. All individual survey information remains confidential.

www.ThinkHDI.com/takethesurvey2009
Jim McKennan, aka Dr. Jim the Service Doctor, has been writing “The Service Doctor” column for SupportWorld for five years now. This special column marks the 5th anniversary of “The Service Doctor” column.

Mixing metaphors is okay if it helps make an important point. Or two. First, I’ve come a long way since I began writing “The Service Doctor” column for SupportWorld five years ago. Has it been that long? It only seems I have aged about ten years since then, so I guess a five-year anniversary is about right. (I think I age at the rate of about two years of aging to one year of time passing. Hardly seems fair… but such is life.)

Julie Neider (SupportWorld Editor) and I were just chatting about how neither of us believes it has been five years since I began the column. It has. The truth hurts. So where have I been and where am I now? Actually, I have evolved and so has the support industry. Thankfully I was not left behind. In fact I have been able to get in front of the curve instead of behind it for a change.

Five years ago I was an IT professional, a practitioner if you will. I worked for a financial/technology company as a manager of several IT groups, including a help desk (we didn’t call it a service desk then). I had gained some useful knowledge about managing my groups mostly through trial and error, after making many mistakes.
But I did see value in training and was able to find training that would help me be a better manager. So I became a Certified Help Desk Analyst and Certified Help Desk Director. I sent my staff through the analyst training as well.

I have found my membership in HDI to be the single best career move I ever made. That was mostly due to some great relationships with smart and caring people from around the world who had a connection through IT support. Eventually, I became the Western Region Director of the Member Advisory Board for HDI, an elected position, no less. And I was appointed to the Support Center Standards Committee for HDI. Several of the best jobs I ever had I got through my HDI relationships. Including the job writing for SupportWorld (thanks Julie!) and my current “day job” as a consultant and trainer.

No Man Is an Island

I remember like it was yesterday (five years is kinda yesterday), that most of the time I felt like my staff and I were on an island. We saw other islands nearby but we weren’t connected to them very well. Each IT group acted rather independently from each other and didn’t cooperate or work well with other groups unless there was no choice. There had to be something in it for them before any of the groups would work together cooperatively. There were no Service Level Agreement (SLAs) with the business and certainly no Operational Level Agreements (OLAs) between the various IT groups. It was hard work, mostly on our own. It was a miracle whenever we did accomplish something important with other IT groups since no one really “played well together.”

I began to hear about better ways to operate IT organizations such as ITIL® (Information Technology Infrastructure Library) but these frameworks were of no interest to the company I worked for. I wanted to get some basic ITIL understanding through a certification course, but my company would have nothing to do with it. Whenever I asked other people and vendors about ITIL, no one seemed to know much about it. Even software vendors were only vaguely familiar with the acronym, so I dismissed it myself.

But I always seemed to be struggling and quietly fighting with the other IT groups where I worked. So I eventually left that company and knew there had to be a better way. A friend of mine had seen the light and decided to get into the ITIL training business. He talked me into spending some of my own money and I got certified in the ITIL version 2 Foundations course. It changed my life and sent me down a different path in my career. I then become an independent consultant. The company was called McKennan and Associates even though I was a one-man band with no associates. But I must have been an extremely good salesman because for my first gig with my first client, the owner offered me enough work to be fully employed for a long time. As a result, I just signed on as an employee with the company and performed consulting work for their clients. Therefore, McKennan and Associates only existed for a couple of weeks. I learned a lot very quickly on my consulting assignments and began to see opportunities to use the knowledge I gained in my first taste of ITIL training.

But I wanted more and through a contact at HDI I was recruited to become an IT Management Consultant at Pink Elephant where I have been for the past four years. Now I am bloated with ITIL, have eight ITIL certifications (and counting) including IT Service Manager and ITIL Expert, currently the highest certification in ITIL v3. Boy, if only I had all these certifications and knowledge when I was a practitioner, things would have been a lot different and a lot better! Sigh!

The Industry Evolved Too

I wasn’t the only one who saw the light and evolved. The support industry has certainly recognized that it needed to find better ways to operate. However, there was a lot more money five years ago so few saw the need to become more efficient. We could simply throw a little money at most of our problems and get reasonable results. Not so in today’s economic reality. IT needed to become more efficient and effective to survive.
IT organizations saw value in things like ITIL, Six Sigma, COBIT, etc., and began embracing education in the framework that best suited their needs. Service Management software companies could barely spell ITIL five years ago but now most of the major software companies have adopted the ITIL standards for their software. ITIL has become the de facto standard for operating IT organizations worldwide, with an updated version (v3) of the ITIL framework recently introduced and published in May 2007.

The Monster in the Basement
IT had to evolve. The business was demanding that we become more aligned with them and more sensitive to their needs than we had ever been before. I remember years ago in my early days in IT, I was attending a meeting in the corporate board room along with a small group of IT managers and directors to present a proposal to the business executives in order to get some funding for a pet project. As I listened to the IT director that was presenting the proposal, I noticed he used a lot of IT jargon and IT acronyms as he described the project. I also noticed a lot of blank stares from the executives throughout the presentation indicating they probably didn’t understand everything he was saying. When he finished, he turned to the blackboard behind him and wrote a large dollar amount and told the executives, “This is how much we need for this important project.” He then turned, sat down, folded his hands and waited for a response. The executives slid their chairs back and began to huddle together. After a few moments, the vice president who was leading the executives’ discussion motioned toward us and said, “You’ve got your funding. You can begin the project.”

We got up, shook hands with the executives and started down the hall toward the IT department. I heard the IT presenter quietly laughing to himself. I caught up to him and asked what was so funny. He said, “I know that none of those executives had a clue what I was talking about. But frankly, I don’t care, as long as they keep funding our projects!” It struck me that he was right. We made no attempt to make sure we spoke in a language that the business understood. We didn’t care if they saw we were doing important work or not. No wonder the business referred to IT as “the monster in the basement that eats all the money.”

We can’t be that way any more. We have evolved, but so has the business. Now executives want to know, “What’s in it for me?” Having our goals aligned with the business is not enough. We have to be integrated with the business, “be the business.” With funding tight we also better be very efficient. This is why the frameworks such as ITIL have become so important and ubiquitous.

As I travel from client to client like a honey bee flitting from flower to flower, I am beginning to see many organizations making great strides in understanding how to better serve the business so the business can more successfully navigate the obstacles in their path, with my help, of course pollinating the clients with my wizardry!!! More mixed metaphors…I can’t help it.

In IT I am seeing situations where there are fewer “islands” or silos. IT groups are finding it necessary and easier to work together for the common good of the business. Helping those IT relationships are carefully crafted OLAs that are aligned with the business goals in the SLAs.

Back to the Future
Most IT organizations today are adopting standards for operating that are found in the various frameworks mentioned above. I happen to have tied my horse to the ITIL wagon. But whatever choices your organization makes you must be able to adapt to the business needs, move with agility, and become a part of the future, not the past. Good luck on your journey.

PS: If you have a burning (or a lukewarm) question for Dr. Jim, send me an e-mail at drjimtheservicedoctor@yahoo.com. You might find your question and my answer in “The Service Doctor” column in this fine magazine.
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(1) align our strategy,

(2) be a valued asset,

(3) worry only about what we can control; and,

(4) continually improve.

Becoming a UNIVERSITY HELP DESK of Distinction
Two years ago the Office of Information Technology Help Desk at Boise State University embarked on an ongoing journey. Our destination: To become a University Help Desk of Distinction. Along our way we have been guided by four principles: (1) align our strategy, (2) be a valued asset, (3) worry only about what we can control; and, (4) continually improve. The well-reasoned nature of these principles is they transcend through both prosperous and difficult times.

**Aligning Our Strategy**
Our first step on the journey to distinction was to discover for ourselves Boise State University’s newly-defined strategic direction. Everyone on our staff could recite the vision statement: “Becoming a metropolitan research university of distinction.” However, few could explain what it actually meant, and none of our staff could relate their day-to-day job activities to the statement itself. If we were to become part of the university’s path to distinction, this lack of understanding had to change or we would be left behind. Thus, strategic alignment became our first principle.

We already considered ourselves quite proficient at providing IT services to campus, but we had a problem. Our focus was on technology, not the university. Conversations about upgrades and implementations focused on minimizing the disruption to IT rather than maximizing the benefit to the university; discussions were often prefaced with, “How can we make needed changes in the IT environment in such a way that the changes will not increase the number of calls to the help desk? Our vision was not only limited, it was selfish.”

The more we discussed the overall mission of the university, the more we became aware of our strategic misalignment. Our help desk is chartered to support administrative units, and is far removed from the university’s academic areas. As we recognized the mission of the University was focused on research, improving academics, and engaging the public, we struggled to figure out how the administrative help desk fit in with this strategy.

To become strategically aligned, we realized we needed to become a **valued asset** to those directly implementing the university’s strategy.

**A Valued Asset**
Being a valued asset means many things. First, and foremost, a valued asset understands the responsibilities of each area of the university. Second, it means nurturing and maintaining a relationship of trust. Third, a valued asset is an important resource upon which departments know they can rely upon.

Learning and understanding the needs and responsibilities of academic areas and departments helped us immensely. Previously, we merely provided technology to departments. Now, as a valued asset, we’ve gained and earned a seat at the table; we regularly sit down and discuss desired outcomes with departments, and provide a variety of technology options to choose from. In the past we would complain about not knowing about a project until the technology was ordered and had arrived on campus; now we frequently find ourselves involved at the beginning of that process, with others seeking our advice and experience. Key decision-makers have come to value our input.

Simple things have helped. We have become involved with student orientation activities. We participate in meet-and-greet sessions for new faculty. A help desk employee attends our network team’s weekly staff meeting. We have reached out to individual departments before major system upgrades launch and discuss in detail what is going to occur, how they will be affected, and happily addressed their questions and concerns.
We have expanded our communications outreach to include weekly articles in our campus faculty newsletter, as well as forged valued relationships with our communications and marketing department. We’ve even thrown barbecues with our applications development team.

As we have grown to better understand other departments and their needs, we have built relationships of trust campus-wide. This trust has gone a long way. Not only do key university areas trust and value our input, they are also far more forgiving if we mess up. All of this has led to the help desk being viewed as a department vital and valued to Boise State University.

Worry About What We Can Control
Becoming a valued asset did not happen overnight, and was in no way easy. Our conversations with help desk staff on how we could improve our standing with the university were initially focused on problems with other teams. Countless comments began with, “If the network team would just...,” “If people would just follow our processes...,” or, “We can’t do that because they won’t listen to us...” None of the suggestions began with, “Our team needs to...”

Our transformation began with a simple exercise. On our conference room whiteboard, the team began to list all of the things that appeared to be unchangeable, holding us back from excellence. After a list was generated we picked three of the items and broke the team into small groups. Each group brainstormed solutions on how to overcome the barriers; after several minutes we rotated and began again. Finally, we all came back to the table and presented our ideas.

We began to recognize what we needed to be responsible for: (1.) customer interaction and satisfaction; (2.) expertise managing the desktop platform; (3.) office automation and efficiencies; and, (4.) account provisioning and access control.

This simple exercise helped illustrate where our problems actually resided, presented us with solutions for solving those issues, and engaged the staff in thinking about how to improve their own house before worrying about others. Once engaged, our help desk was ripe for the fourth and final principle, continuous improvement.

Continuous Improvement
By focusing only on what we knew we could control, our staff began to make small yet meaningful improvements. We knew changing everything at once would frustrate our customers (if not our own staff). Rather, small changes would be easier to sell and implement, and changes that proved unsuccessful could be more easily rolled back.

Continuous improvement has been the key to tying all of the other principles together. Small changes have focused our staff on improving from within. Implementing a series of successful changes, many of which we have had a key place at the table, has helped us to be viewed as a valued asset. Trust has been built as both our staff and the entire university look back at the progress that has been made and recognize improvements in the IT environment. Finally, continuous improvement has helped align us in participating in Boise State University’s quest to become a metropolitan research University of Distinction.

Many of our improvements focused around defining our processes. We took the time to sit down and illustrate the current state of all that we were doing. After a particular process was defined it was easy to see places for improvement. One example was our account provisioning process. When we started, the process was manual and paper based. Our first change was a simple one; rather than route requests for approvals via fax, we began to scan the requests and send them through e-mail. Eventually the entire process moved to our call tracking system.

Once the principles are understood, the journey to distinction is one that can be traveled in any economic climate. These changes did not cost...
money, nor did they require additional time or resources. If anything, implementing these changes has saved us money, time, and brought our staff closer together.

Are we the help desk of distinction we want to be? Not quite yet, but we are closer than we once were. We’ve discovered we are capable of fulfilling Boise State University’s defined strategy on our own; we were not so removed from the vision as we first thought. We are now working closely with academic departments on using collaborative tools to improve classroom instruction, and working with HDI Forums on research to benefit other universities, as well as engaging the public with articles like this to share our story.

You are not isolated either. Remember the four guiding principles listed above. Find and understand your organization’s strategy. Be a valued asset. Worry only about what you can control, and strive to implement continued incremental improvements. Take the journey to become a Help Desk of Distinction.

Mark Fitzgerald started his career at Boise State in 2006. Previously he managed three other higher education help desks. Mark holds a Masters in Business Administration from Boise State and his undergraduate degree is from Brigham Young University. He holds industry certifications from Dell, Novell, HDI, and in ITIL. Mark loves to teach others and participates in many workshops and conferences. He is currently chairing the Help Desk Institute (HDI) Higher Education Forum.

Shad Jessen was hired at Boise State University in 2001, previously having worked eleven years at Portland State University. Shad attended Southern Oregon University and Portland State University. He holds HDI Support Center Team Lead and HDI Support Center Analyst certifications, as well as several software certifications. Shad is invested in putting a face on information technology, interacting with the campus community to facilitate a mutual understanding of how OIT services are integral to Boise State University. Shad’s work earned him the first OIT “Excellence in Service” award in 2006.
After talking to a wide range of vendors exhibiting in the Expo Hall, following are some of the trends I felt would have a strong presence in the support industry over the next year.

**SaaS**

SaaS or “Software as a Service” is extremely attractive for support centers as a means to more effectively control costs and resources, both desirable goals for any support center, failing economy or not. After hearing much about SaaS in the Expo Hall and trying to better understand it, I found that in short, SaaS is a way to use software without having to install it; the “service” is usually accessed remotely through a browser. Wikipedia says this:

“As a term, SaaS is typically thought of as a low-cost way for businesses to obtain rights to use software as needed versus licensing all devices with all applications. The on-demand licensing enables the benefits of commercially licensed use without the associated complexity and potential high initial cost of equipping every device with the applications that are only used when needed.

Using SaaS can also conceivably reduce the up-front expense of software purchases, through less costly, on-demand pricing from hosting service providers. SaaS lets software vendors control and limit use, prohibits copies and distribution, and facilitates the control of all derivative versions of their software.”

Almost every vendor offering a support solution was either already supporting SaaS as a model, or in the process of converting their solution over to SaaS.

“We introduced a SaaS-based service desk tool because we recognized the need for IT organizations to adopt a solution that would eliminate costly upgrades, annual maintenance fees, lengthy implementation cycles, and the need for in-house infrastructure. The SaaS delivery method enables organizations to implement a solution that is delivered out-of-the-box and is scalable for years to come. As companies seek to consolidate and improve efficiencies, it is imperative to have a tool in place that not only reduces operational expenses, but increases efficiencies and provides a clear dashboard of process performance metrics,” Yash Shah, President and CTO, InteQ Corporation.

Many of us are familiar with SaaS within other industries in IT and I think it’s safe to say that the support sector is embracing it as the preferred and expected way to delivery support tools to our organizations in the future.

**Mobility**

Implementing and/or supporting a mobile workforce is no longer a question of “can we do it?” but rather a question of “how can we do it?” With its flexibility; the saturation of mobile devices carried by employees (it’s not just the CXOs who have laptops, Blackberries, and Smartphones anymore); and overall savings gained, the industry is seeing an increase in home workers and a mixed mobile workforce.

Demands are high for tools and features that allow us to support home workers or onsite workers with mobile devices. What do support organizations want to accomplish? They want to be able to manage customer requests with their Blackberries or other handheld devices, to be able to access/ update records, tickets, and assets, or be able to escalate
issues if necessary. Managers want to monitor and manage their service organizations while out of the office or away from their service desks.

In addition to all that is needed to support remote workers and devices, analysts themselves are moving into remote support roles and seek the right tools, training, and leadership to effectively perform their jobs and provide effective support from an offsite environment. It is interesting to note that more companies are allowing support analysts to work from home, which was largely considered taboo within the support industry in the past. With powerful options inside service tools cropping up that ease the management and accessibility of home-based analysts...this trend is bound to grow over the next year.

I held some very interesting conversations with exhibitors about the variety of products and tools that either aid in the support of mobile employees and devices or, those that provide a means for mobile support employees to deliver services on the fly from their blackberry, laptop, or home office.

Gerry Roy, Solutions Management Director, BMC, “At BMC we see mobility becoming a big issue with many of our customers...specifically around accessing data such as incidents, change requests, configuration information (asset), and service level management data in the field. When a technician is sent onsite to fix a server, application, network device, or any other critical component of a service, they no longer have to run back to their desk or find an open system to access the incident report, look up the correct configuration, or check to see if they have a replacement item in stock to repair the broken component. This data is all available right in their hands through their Blackberry device. This speeds the repair time of any component in the field, makes the technician more efficient, and if they close the ticket or change request in the field with the new configuration data, they update and maintain their configuration database on the fly.

The entire concept of mobility is to put all the important data right where the technician is, improving repair time and improving the care and feeding of the configuration data. There is another added value of using a Blackberry or other mobile device as the method for accessing data, updating data, and closing incidents or change requests, the cost of a Blackberry is far less expensive than a laptop.”

This doesn’t even scratch the surface on how to train, manage, and deploy remote workers, be they a part of the support team or within the business in general. It is no longer acceptable to toss your worker a laptop and phone line and expect them to be up and running. Our home workers need the proper training to perform their jobs effectively. Managers as well need training and advice on how to manage their “virtual” employees. How does one communicate effectively? Manage/monitor home employee metrics? Do they differ from onsite metrics?

IT and support will indeed continue to see the virtual workforce grow, new and improved mobile gadgets surface, and still need to stay with “it” in the curve of all this change. As an industry, we will have to adapt the way we manage, the way we think, the tools we will use, and the best way to service our customers.

Social Networking, Self-Service, and Twitter

Let’s face it. Today’s users are all about helping themselves. Do not assume that end-users aren’t asking co-workers, searching on Google, or posting a tweet on Twitter before contacting your support center with their support woes. They are.

The good news is, many organizations realize this and are finding creative and innovative ways to offer self-service to their customers as well as monitoring Twitter as a means of support. From intelligent, interactive avatars to forums, blogs, powerful search engines, FAQs, and more…support “ain’t the same old song and dance anymore.”

Twitter is successfully integrating itself into marketing, communications, and now customer service at an astonishing pace. “Online, social networks are an increasingly important channel that companies need to be prepared for. More than 50 percent of customer interactions in 2008 occurred in Web-based or Cloud-based interactions outside of traditional customer service channels, according to Stamford, Conn.-based Gartner Inc.”

It’s significant to note that self-service, while highly attractive to our customers, is very compelling from a support perspective as well.

“As IT budgets shrink and service quality expectations rise, the service desk is often overloaded with repetitive requests that limit their ability to focus on critical services for the business. What’s more, IT users and customers often don’t know what IT services are available to them or even how to ask for them. Over 60 percent of IT customers believe that IT has difficulty...”

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1 Customer service on Twitter takes more than software, By Barney Beal, News Director, Mar 31, 2009, SearchCRM.com,
meeting service expectations and commitments. Self-service is one solution that can help businesses meet the challenge. Self-service makes it easier for end users to find information without assistance, request business and IT services, and, track the status of their requests. All of this, while dropping service desk call volumes, shortening call times, and cutting the overall IT support cost,” Chandra Callicutt, Product Marketing Manager, ITSM, TechExcel, Inc.

These trends will continue to push support centers in their choice of applications, methods of answering customer inquiries via self-service, ways in which they interact with users via the phone, Web, and e-mail, and forever change the parameters of customer service.

**In Closing—“Doing More with Less”**

The slack economy continues to impact decisions we make within our support organizations. “Doing more with less” was never as important as it is now. With budgets, human resources, and projects being cut and put on hold…everyone is taking a second look at how they run their businesses. Finding new and innovative ways to service our customers in the way they want to be served while controlling costs, will be one of our industry’s biggest challenges. Efficiency as well as maximizing productivity will continue to drive our technology decisions in the coming year.

I will be exploring these trends in more depth in upcoming Technology Trends features in SupportWorld.

“Remember all those files you told me not to delete? I’m hoping you remember them really well.”
We all know the importance of training and developing our staff. It keeps team members motivated, generating increased productivity. They eagerly use their skills to the benefit of the business. So why is it that we continue to take short-cuts with training?

There are a couple of reasons. First, some fear training their employees. They don’t want to spend big money to train workers, only to see them quit and use their new skills to benefit a competitor.

In Stephen R. Covey’s book, *The Speed of Trust*, there is a quote from an unidentified CEO. Someone asked him, “What if you train everyone and they all leave?” He responded, “What if we don’t train them and they all stay?” Enough said.

Another reason companies don’t train people is the cost. Let’s face it, when times are tough and budget cuts loom, it’s very easy to drop employee training. Unfortunately, this short-term money saving tactic is extremely costly in the long run. It does a disservice to the people, lowering morale, and most importantly, it negatively impacts the company. Of course these negative impacts are not easily measured. They are not individual line items on an income statement like the training budget. Typically the manager that cuts training gets a bonus for making his/her numbers, and future dips in profit are rarely tied back to a lack of training. The cycle continues.

Training does not have to cost a fortune. Using the train-the-trainer method where a select few people attend a class and then train the rest of the team can be cheap and very effective. Peter Drucker stated, “Knowledge workers and services workers learn most when they teach.” Encouraging team members to teach others is a very effective training method and according to Covey it “accelerates the rate of learning, both individually and organizationally.”

Ironically, the same managers that put little to no effort into training are often the same that complain that there is a shortage of qualified labor. They will sound off about the importance of constantly changing, and the need for companies to continuously re-invent themselves in the global economy, but will put very little effort into what is required to do so.

Don’t let fear or budget constraints keep you from developing your team. Obtain formal training as appropriate. Encourage your team members to teach each other, and do some teaching yourself. A skilled team that retools frequently is more productive, and has a much better chance of keeping your company vibrant and profitable well into the future.

Nick McCormick is a Principal with Be Good Ventures, LLC. Would you like to improve your management performance? Go to http://BeGoodVentures.com/ to download a FREE file containing 5”x7” training cards based on Nick’s book *Lead Well and Prosper: 15 Successful Strategies for Becoming a Good Manager*. Act on some of the tips today! Be Good!
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- Call: **1.800.248.5667**
- Email: Register@ThinkHDI.com

### Certification Courses

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<th>Public Classroom HDI Members / Non-members</th>
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<tr>
<td>HDI® Customer Service Representative</td>
<td>1 day</td>
<td>$795 / $895</td>
<td>6 hours</td>
<td>$345 / $395</td>
<td>Delivered online and onsite. Call for pricing.</td>
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<td>HDI® Desktop Support Technician</td>
<td>2 days</td>
<td>$1,295 / $1,395</td>
<td>10-12 hours</td>
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<td>3-4 Arlington, VA</td>
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<td>$1,295 / $1,395</td>
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<td>HDI® Support Center Manager</td>
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<td>HDI® Support Center Director</td>
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<td>17-19 Los Angeles, CA</td>
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<td>Knowledge Management Foundations: NCS™ Principles</td>
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<td>ITIL® v3 Foundation</td>
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### Service Management Courses

Service Management Courses: Available as Public Course or Online, Virtual Courses (Live, instructor-led course delivered over internet via two-hours sessions for three consecutive days.)

<table>
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<tr>
<th>Course Description</th>
<th>Public Classroom Length</th>
<th>Public Classroom HDI Members / Non-members</th>
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<td>1 day</td>
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Schedule is subject to change. Check [www.ThinkHDI.com/courses](http://www.ThinkHDI.com/courses) for updates.
Higher Education Forum Meets in Las Vegas

The HDI Higher Education Forum (HEF) group met at the Nevada System of Higher Education on the UNLV campus on April 5, 2009, one day prior to the 2009 HDI Annual Conference in Las Vegas.

During this one-day HDI HEF meeting, the main topic of discussion was “Time Management: Capitalizing on Efficiencies.” Mia Melanson, an HDI Faculty member, led this discussion. Mia actually kicked this session off a couple of weeks prior to the meeting. Mia had each participant track their time for five days. The goal of this exercise was to discover patterns on how they spend their time. During the meeting, the group analyzed the results of their time logs. Analyzing the time logs helped the group determine their strengths and weaknesses related to time management, which include goal setting, prioritizing, managing interruptions, procrastination, and scheduling.

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.

For more information about HDI’s forums, please call or e-mail us at 800-248-5667 or lcook@ThinkHDI.com.

Local Chapters Honor Katherine Spencer Lee

At the Local Chapter Officers meeting which took place at the HDI 2009 Conference and Expo in April, Local Chapter Officers recognized Katherine Spencer Lee for her dedication and devotion to local chapters over the past years. She was recently promoted within Robert Half Technology and will no longer be working directly with HDI or the local chapters. The chapters presented her with a frame of “barefeet” for making a “huge imprint” on the local chapters and HDI members. Dave Willmer, who will be taking over for her, and is the new Executive Director of Robert Half Technology, was welcomed with a huge pair of sneakers (size 17), as he has some “big shoes to fill.”

Katherine, you will be missed!

HDI Annual Conference & Expo

We were excited to see so many familiar faces as well as new in Las Vegas in April and we look forward to seeing you next year.

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