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Infrastructure

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Project Management Primer, Part 4

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(presented by Deborah Monroe)

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letter from the **DIRECTOR**

Dear *SupportWorld* Readers,

Welcome to the New Year! Here at HDI, as we look back on the services and networking opportunities we launched last fall, we are full of optimism and anticipation for 2011. HDIConnect, which went live in November, is sparking lively discussions, controversial debates, and just plain ol' fun. The first HDI Desktop Support Practices & Salary Survey went out in December, with the report to be released in March. Our training and certification department introduced the HDI Desktop Support Manager course in October and the first wave of desktop support managers has already earned their certifications. We're deep into program development for Fusion11, our new partnership with itSMF (September 11–14, in Washington, DC). And we're anticipating the largest annual conference attendance in recent years (March 29–April 1, at the lush new Palazzo at The Venetian in Las Vegas).

We hope you like our updated nameplate, designed by our new art director, Katharine Nelson. And, even if you receive the printed magazine, be sure to take a look at the digital edition. With this new format, you can jump directly from the cover or table of contents to the article of most interest to you; you can even link directly from our advertisers' ads to their websites to get more information about the products and services you need.

New to the *SupportWorld* program this year, each issue will be organized around a central theme, enabling us to delve deeper into hot industry topics. We're starting off the year with a perennial favorite: ITIL. Last year, the chatter surrounding ITIL's fading star prompted HDI and Global Knowledge to cosponsor a research project on the business benefits of ITIL. Not only is ITIL alive and well, it has become a mainstream service management discipline and is delivering benefits that might surprise you. To learn more, turn to "ITIL's Benefits to the Business: An Overview" (p. 6). Then turn to Malcolm Fry's provocative call to restore "infrastructure" to its rightful place in service management, "Who Stole the Infrastructure?" (p. 18). Finally, we are launching a new Tech Trends-cum-Buyers' Guide feature. Turn to p. 32 to peruse a list of ITIL-compliant service management solutions that will help enable your ITIL initiatives.

You will, of course, find our regular features, as well. We hope you enjoy this issue, and, once again, Happy New Year!

Sincerely,



Cinda Daly
Executive Director of Business Content

Please send us your comments and questions regarding *SupportWorld*.

Letters to the editor should be sent to editor@ThinkHDI.com or by mail to: 102 South Tejon Street, Suite 1200 • Colorado Springs, CO • 80903

We reserve the right to edit all submissions.

ITIL Benefits to the Business:

An Overview of a Joint Research Project from HDI and Global Knowledge

by Cinda Daly

In 2010, HDI and Global Knowledge cosponsored a research project to understand more about the state of ITIL implementation, the benefits companies have actually achieved, and the key success factors. While there are many ITIL benefit surveys out there, what sets this survey apart is that it comes from people who are actually practicing ITIL. Thus, this ITIL benefits survey provides an objective and realistic examination of what you can truly expect from following ITIL good practices, as reported by your peers.

The data were collected from August 15 to September 10, 2010. During this period, 358 surveys were completed via an online survey, by respondents from across the nation and around the world. Over half of the respondents (52%) have a primary position in the IT service management (ITSM) area; 60 percent are in IT managerial or supervisory roles, most from firms with national and global presence; 40 percent come from firms with more 10,000 employees; and over 50 percent come from the more regulated areas of government, education, health services, law, and financial services—a true cross-section of ITIL practitioners.

Figure 1: Job Function

Which of the following categories includes your primary position?

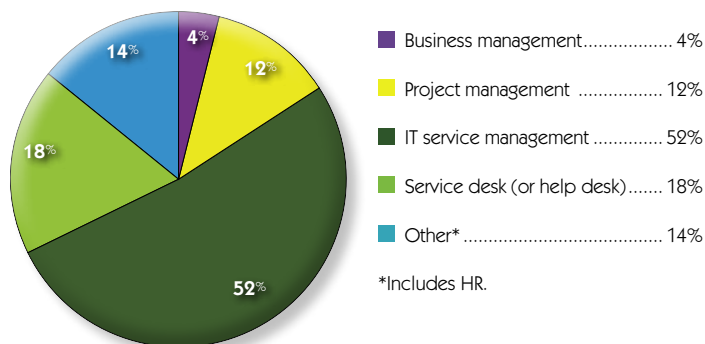
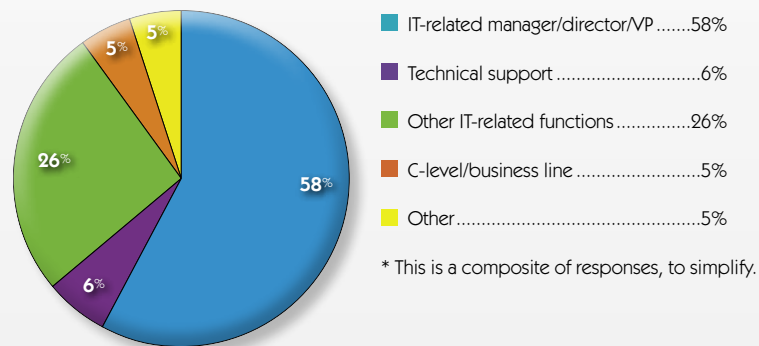


Figure 2: Job Role

Which of the following best describes your role in the organization?*



Key Findings

The survey results challenge some of the ITIL community's commonly held beliefs, modify others, and create new paradigms for success, answering provocative questions like:

- Is C-level management commitment required for ITIL success? *(No. It has a small impact, but it dramatically changes what you need to do to be successful.)*
- Is ITIL just a service/help desk practice? *(Not at all. In fact, the highest growth area in ITIL is not the service desk, or even change management.)*
- Is cost reduction the chief benefit of ITIL? *(No, it's not, and you need to be careful since cost reduction is not even one of the top three benefits.)*

Service management professionals are more likely to take a leadership role in areas of strategy/service definition, operations, and transition/implementation. Those individuals also report a greater incidence of v3 certification; they are "following" a greater number of the ITIL disciplines; they utilize more internal groups to drive

Source (all tables and charts): Global Knowledge, "ITIL Benefits to the Business" (2010)

their ITIL strategies; they are more likely to have C-level support for their initiatives; and their organizations, in general, behave more positively toward ITIL than the organizations of their counterparts. These are just some of the eye-opening findings in the Global Knowledge/HDI “ITIL Benefits to the Business” special report.

Top ITIL Disciplines

Conventional wisdom would have us believe that incident and change management are *the* ITSM growth areas, since IT is so “immature.” However, this study reveals that many firms already have established incident (63%) and change (53%) management disciplines. One of the most significant findings is that, of the top three ITIL processes, problem management—a process that requires organizational maturity and commitment—is the ITIL process most firms are either implementing (24%) or plan to implement (24%). Furthermore, 43 percent currently follow ITIL problem management processes, reflecting a 91 percent adoption rate among this group of respondents.

Even more interesting is that while problem management is the leading growth area among the top three implemented ITIL processes, the highest growth in terms of current implementations is in service request management (27%) and the service catalog (26%), processes that relate to customer satisfaction and the standardization of IT service delivery.

Table 1: The Top Three ITIL Processes

ITIL Process	Currently follow	Currently implementing	Planning to implement	Do not follow
Incident management	63%	19%	12%	7%
Change management	53%	21%	18%	8%
Problem management	43%	24%	24%	9%

While ITIL incident, change, and problem management top the chart, each ITIL process is in use throughout the respondent population. Availability and capacity management are the other areas that are most likely to be on the planning horizon. The survey shows 38 percent of respondents plan to implement availability management and 37 percent plan to implement capacity management. This is fascinating, since industry pundits typically single these out as areas only a few very mature organizations implement.

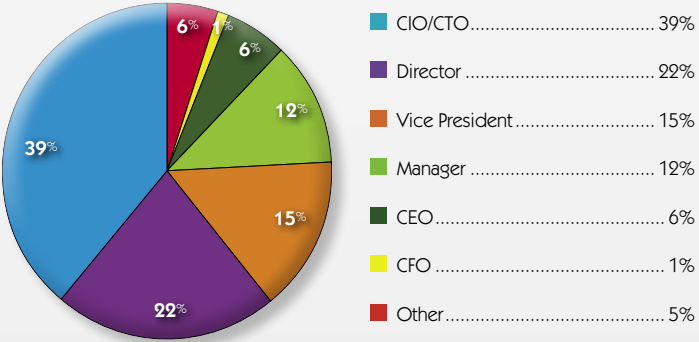
The key takeaway here is the further indication that ITIL seems to have “grown up.” What may not be as obvious is that ITIL incident and change management—done right—set the stage for problem, availability, and capacity management. By stabilizing IT service delivery, allowing the firms that follow it to mature and freeing the resources required to shift from running and reacting to building and transforming, ITIL appears to have crossed a bridge.

C-Level Support

Almost half of respondents reported they had C-level support for their ITIL initiatives, with the CIO or CTO serving as a champion for the initiative. Having senior management commitment was not required for success, but it did make the path easier. According to respondents, it is easier to attain the benefits of ITIL when senior management is committed, but it also comes with a change in the focus of the benefits. Having C-level commitment means a greater focus on improving service performance, satisfying the end user, reducing the cost of IT service delivery, and improving the likelihood that IT projects will succeed.

Figure 3: Management Involvement

What is the highest level position directly involved with planning, implementing, and/or promoting ITIL across your IT organization?



Contributing Success Factors

Contributing success factors are those that successful practitioners found to be the most helpful. While C-level engagement is not a critical success factor, it is important to note that 71 percent of respondents report that executive support is, in general, the most critical factor for success. In other words, management commitment is critical to success, C-level commitment is not. When asked to assess the importance of several factors, the six items in Figure 4 rose to the top.

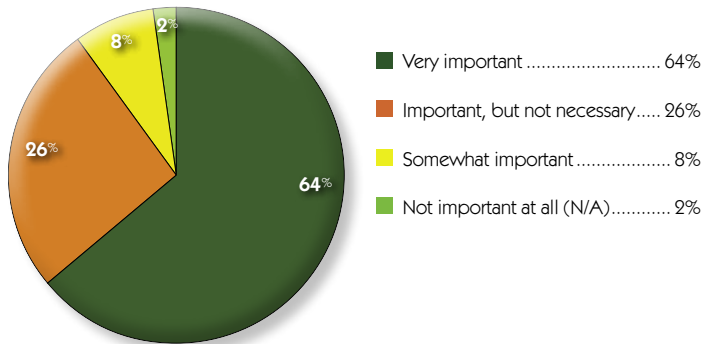
Figure 4: Success Factors

On a scale of very important/somewhat important/not important, how would you assess the importance of each of these factors to the overall success of your ITIL initiative?



There is a difference between practicing IT service management and using software to solve an IT problem. The benefits you get from a tool are not the benefits you get from practicing ITSM. Tools facilitate a strategy and allow a team to complete tasks; tools alone do not make a strategy. As expected, respondents overwhelmingly conclude that support tools aligned with ITIL are very important, and 51 percent cite software (e.g., incident, knowledge, CMBD, etc.) as a success factor.

Figure 5: Tool Alignment

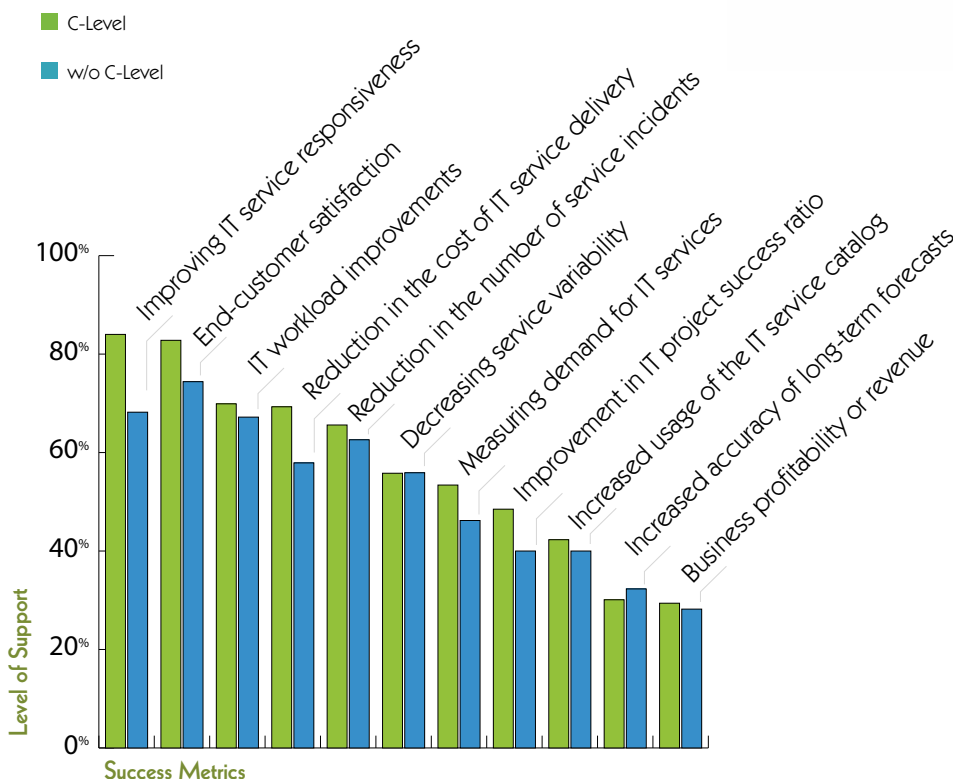


Top Benefits of ITIL

This research uncovered that the top three benefits of ITIL are:

1. Improved IT responsiveness,
2. End-user satisfaction, and
3. Workload improvements.

Figure 6: Measuring the Success of the ITIL Initiative



The top two benefits revolve around transforming IT into an organization that is responsive to its customers—in other words, evolving IT into a true service provider. The ability to show improvement in IT service responsiveness is the key measure of success in those organizations with C-level engagement.

Conclusion

The results speak for themselves: ITIL is relevant and ITIL delivers value. With or without C-level support, you can be successful in shifting resources from “keeping the lights on” (KTLO) to innovation by practicing ITIL. ITIL appears to be fully in the mainstream, and perhaps questions around its usefulness are the result of unrealistic expectations, especially regarding cost reduction. Given the depth to which core ITIL processes are in place, it may also be the case that IT managers need less assistance from vendors and consultants. ITSM in general, and ITIL in particular, are simply “how we do things” in IT today. Simply put, the results of this survey show that successful IT organizations have absorbed ITIL into the fabric of their operations and have seen significant benefits from doing so.

To learn more about the results—areas of importance to ITIL initiatives, critical success factors, the various groups involved in ITIL initiatives, the role of third-party services, the scope of ITIL certification, and more—visit www.ThinkHDI.com/itilbenefits and download the HDI/Global Knowledge special report “ITIL Benefits to the Business,” by Hank Marquis with Cinda Daly, Jenny Rains, and Greg Timpany. We invite you to visit www.HDIConnect.com to discuss these results.

About the Author

For more than twenty-five years, Cinda Daly has managed teams, written dozens of industry articles and thousands of pages of technical documentation, developed training courses, conducted sales and service training, and consulted in the technical support and customer service space. In her current role, as HDI's director of business content, she is responsible for HDI's virtual events, research, and print and electronic publications.





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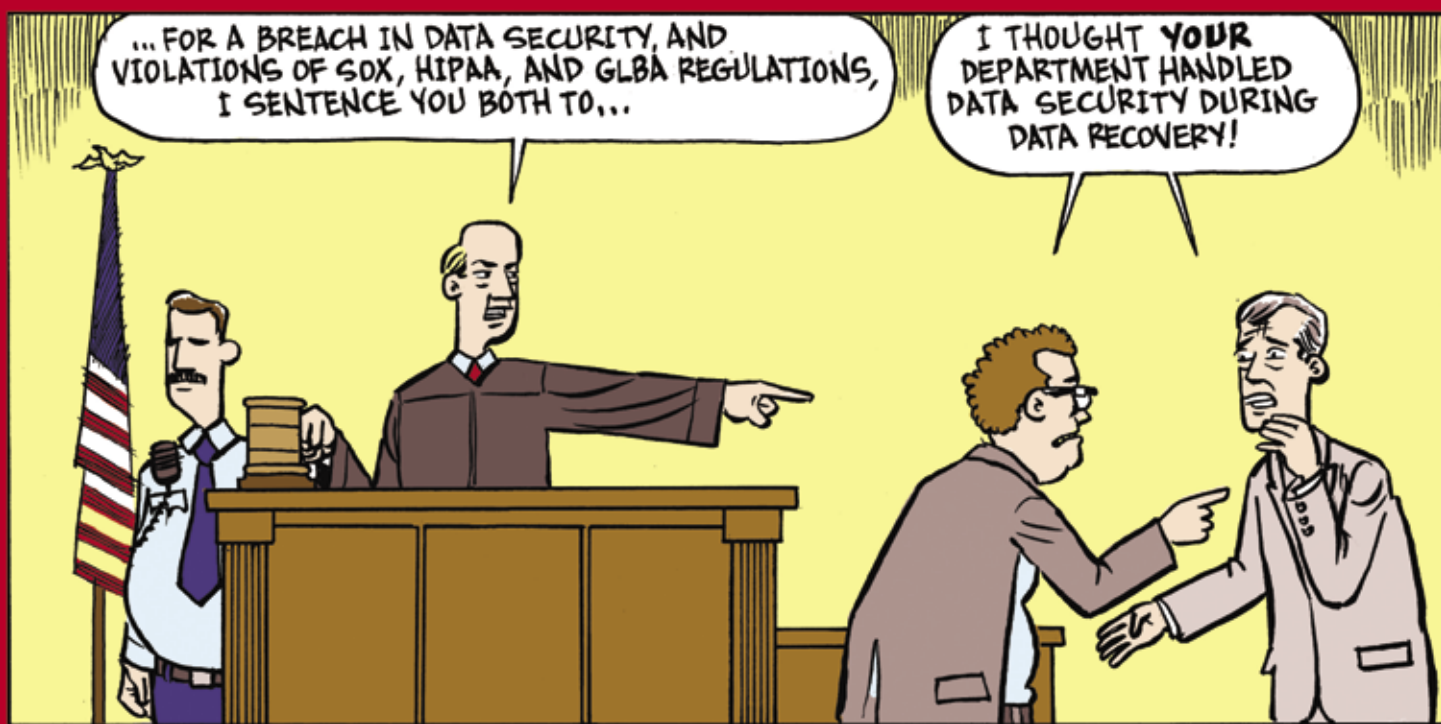
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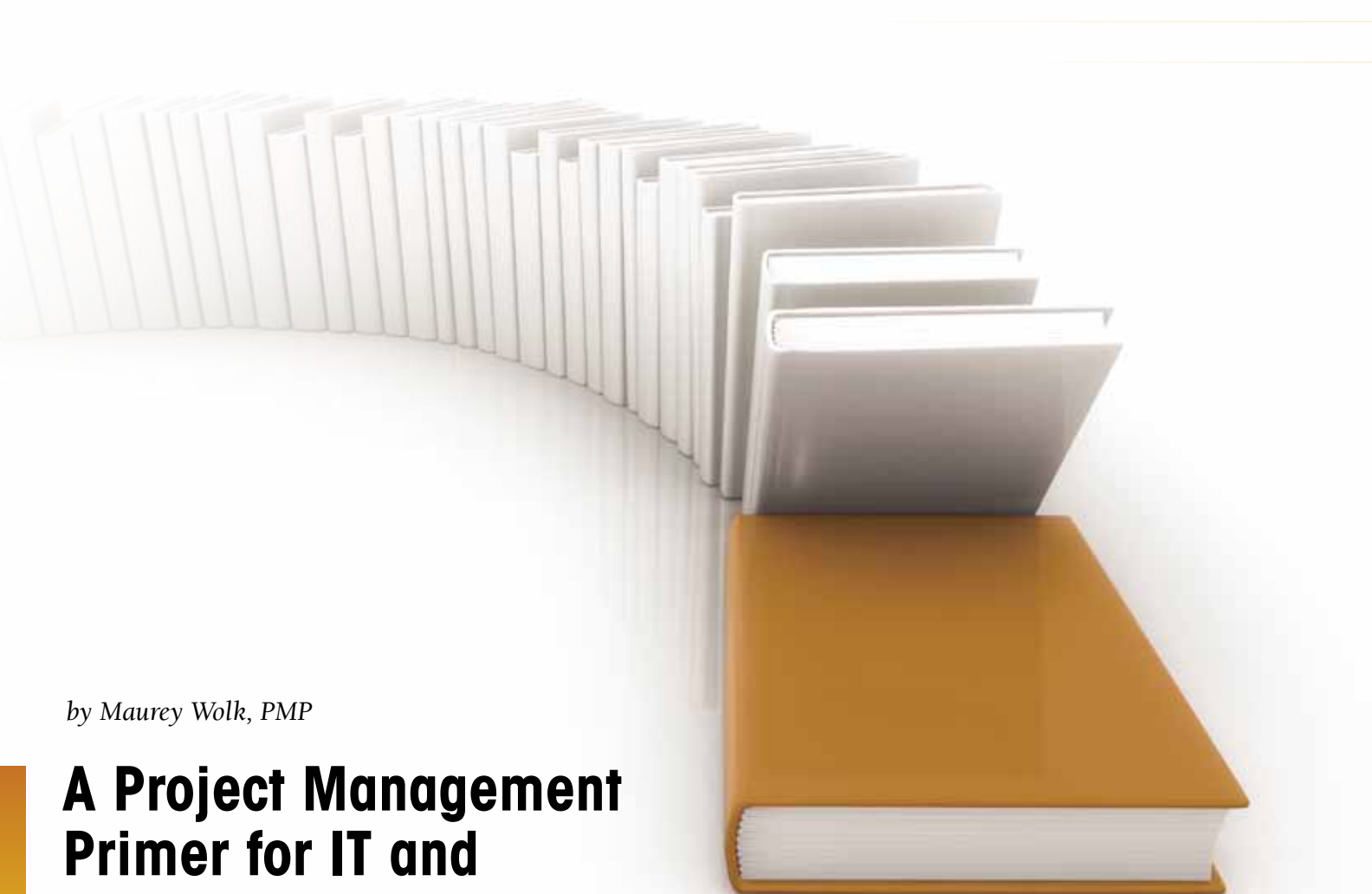


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by Maurey Wolk, PMP

A Project Management Primer for IT and Technical Support Professionals

- Part One: Introduction and Initiating Your Project
- Part Two: Planning Your Project
- Part Three: Executing and Monitoring and Controlling Your Project
- ☑ **Part Four: Closing Your Project and Summary**

Have you ever wondered how many projects, on average, succeed or fail? The percentage of failed projects, at least, is staggering—somewhere between 50 and 70 percent! (Do a Google search if you don't believe me.) How does this happen? One of the primary reasons a project fails is that project management is a specialized skill, and many people who are tasked with managing projects do not have it. It's interesting that most senior executives would never consider allowing anyone other than an experienced lawyer to handle their legal concerns, or a CPA to handle their company's finances, yet those same executives often put just anyone in charge of a project. But successful project management requires special skills, training, and experience.

Over the past three issues of *SupportWorld* magazine, I have shared valuable information, guidelines, structure, and insight on effective project management. My intent has been to give you a high-level understanding of all of the things you need to consider when you are tasked with managing a project. As a support professional, you may not be an experienced project manager. If, however, your executive selected you to manage a project, they did it for a reason—they believed you have what it takes to be successful! But maybe you realize you need

something more to help ensure your success. That's what this series is all about. It certainly won't make you an experienced, world-class project manager, but it will help you avoid the mistakes that new and less experienced project managers often make. In short, it will help you ensure that your project is one of the few that can be considered a true success.

In this final article in the series, I will discuss the processes involved in completing and closing your project. I'll also review the points I've already covered and share additional advice, tips, and suggestions. Finally, I'll wrap everything up into a structured outline that you can use to help manage your future projects. If you have missed any of the articles in the series, they can all be found in the *SupportWorld* archives at **www.ThinkHDI.com**.

Believe it or not, in the past three articles we have touched upon four process groups (initiating, planning, executing, and monitoring and controlling) and forty different project management processes. These processes are all part of the Project Management Institute's structured methodology, which is widely accepted as "good practice" in the project management profession. But let's talk about why the process groups are important. The process groups break the project down into the discrete process that must be completed during each phase of a project's lifecycle. The word "lifecycle" is important because you should think of your project as cyclical, or "iterative." It's a no-brainer that you will *do* actual project work (execute) to get your project done, but if you take nothing else away from this article, remember that planning and monitoring and controlling are just as important. Planning for every facet of your project is the key to your project's success. Once you have thoroughly planned, you will begin the execution of your project, and then it's immediately time to begin monitoring and controlling your project. As you do this, you will no doubt detect variances and things that are not going as planned. You will also sometimes find that "you did not know what you did not know." As you monitor and control your project work, you will need to go back to your planning processes and update or "progressively elaborate" on your plan. That's okay, because your project plan is a living document, guiding everything that happens throughout your project. Now, let's turn our attention to the closing process group and the last two processes: close project or phase and close procurement.

CLOSING YOUR PROJECT

Okay, so your project is basically done. Why should you care about doing more work? There are some very important reasons, including confirming that the work has been done to the specified

The Project Management Institute (PMI) is the world's leading organization for the project management profession. Visit **www.pmi.org** for information and resources on good practices and globally recognized credentials that certify project management expertise.

requirements. You will then need to hand off the completed product and gain formal acceptance of that product. If you recall from the first article in the series, PMI's definition of a project is "a temporary endeavor undertaken to create a unique product, service, or result." The key here is "temporary." A project exists for a finite period of time and in this way differs from an ongoing operational process. Even if your regular responsibilities involve using the product of your project, a clear line needs to be drawn between the completion of the project and the beginning of the operational life of the project's result.

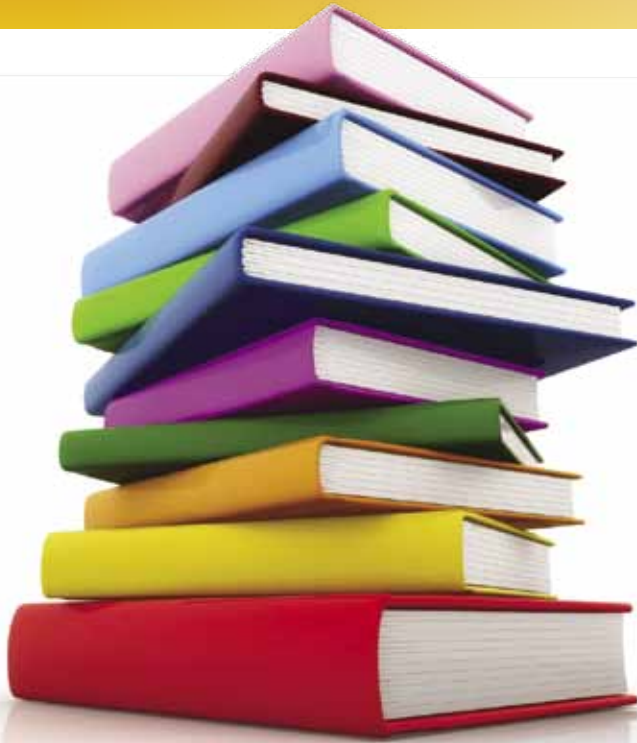
Closing your project also involves completing any final performance reporting and indexing and archiving records. You will also need to update your knowledge base with lessons learned. If your organization has a project management office (PMO), it will surely be involved and interested in this information. Even if your organization is not that formally structured, as a support professional you no doubt understand the value of capturing information. That same common-sense approach applies to project management: documenting lessons learned will help you and your colleagues complete future projects more successfully.

In addition to the close project or phase process, you will also need to complete the close procurements process. This is important, as procurement often involves contracts, formalized obligations, payments, and other legal requirements. As in other areas of project procurement, be sure to consult experienced resources and/or legal experts when necessary.

Finally, you will need to release your resources. Remember that your project resources often will not report directly to you in the organization, but may be borrowed from "functional managers." Your resources may even be contractors or consultants. It's important to formally release your resources and to be sure you comply with any legal, corporate, and human resource policies.



KNOWLEDGE AREAS	INITIATING	PLANNING	EXECUTING	MONITORING & CONTROLLING	CLOSING
Project Integration Management	Develop project charter	Develop project management plan	Direct and manage project execution	Monitor and control project work Perform integrated change control	Close project or phase
Project Scope Management		Collect requirements Define scope Create work breakdown structure		Verify scope Control scope	
Project Time Management		Define activities Sequence activities Estimate activity resources Estimate activity durations Develop schedule		Control schedule	
Project Cost Management		Estimate costs Determine budget		Control costs	
Project Quality Management		Plan quality	Perform quality assurance	Perform quality control	
Project Human Resources Management		Develop human resources plan	Acquire project team Develop project team Manage project team		
Project Communications Management	Identify stakeholders	Plan communications	Distribute information Manage stakeholders	Report performance	
Project Risk Management		Plan risk management Identify risks Perform qualitative risk analysis Perform quantitative risk analysis Plan risk responses		Monitor and control risks	
Project Procurement Management		Plan procurement	Conduct procurement	Administer procurement	Close procurement



SUMMARY

Now let's summarize some of the key topics and processes we have covered in this series. As previously mentioned, all of the PMI project management processes exist concurrently in one of the five process groups and in one of the nine knowledge areas. The table at left depicts all forty-two PMI processes.

The next time you are tasked with managing a project, go back to this table and see if you have given due consideration to every process that's listed for each process group and knowledge area. Even if you don't remember exactly what each process involves, considering each of the forty-two processes will help you identify gaps in your knowledge and take steps to better manage your project. It's important to realize that an entire article could easily be written about each of the forty-two processes, so depending upon the size and scope of your project, you may need to enlist the help of more experienced project managers. There is a tremendous amount of information on project management available on the web or at your local bookstore. The PMI website (www.pmi.org) is a great place to start, and you may even want to purchase a copy of the Project Management Body of Knowledge (PMBOK).

A final (and very important) takeaway from this series is the understanding that the project management processes do not

exist in a vacuum. There are numerous, extensive relationships and interdependencies between the processes in a given process group and between the different knowledge areas. The ways that they interact and relate are so extensive that it's virtually impossible to list all of the possibilities and variables. The important point to remember, however, is that they do affect each other. For example, if you were to find that the necessary project human resources that you had planned for were no longer available, this could affect many areas of your project, such as cost, schedule, quality, and risk. You would need to go back to your plans for each of the related knowledge areas and make appropriate changes. This is just one example, and you should anticipate many similar situations as your project progresses through its lifecycle. (Of course, the larger your project is, the more extensive these changes could be and the more formality and detail you would therefore need as you update your project plans.)

There is much to learn about project management and experience is one of the best teachers. As you gain that experience, remember that the highest recognition for successfully completing a project is often the confidence others have gained in your abilities to deliver results—and another project to manage!

May all of your projects be successful!



About the Author

Maurey Wolk is a leader in bringing together people, processes, and technology to build world-class technology solutions. For the past eight years he has developed and optimized client support organizations for one of the nation's premier financial institutions.

Maurey has led an extensive array of projects including global metrics initiatives, support team consolidations, and the development of continual improvement programs. In addition to a wide range of technical credentials, Maurey is a PMP Certified Project Manager and an HDI-certified Support Center Manager.

For additional information on how to ensure your technology projects are successful, visit www.computerns.com.



ask the **EXPERT**

by Roy Atkinson

In IT service and technical support, it can sometimes seem like you're working in a vacuum. That's probably one of the reasons you joined HDI, or are considering joining—to network with your peers and get good, reliable information. That's where I come in.

With all discussion groups out there on the web, getting an answer to a specific question or concern is often a waiting game. Someone might respond, but there's no way of knowing when. As a remedy, HDI provides easy access to "Ask the Expert," a service provided free of charge to HDI members. While this is primarily an online resource, we will be including a handful of our most provocative questions (and answers, of course) in alternating issues of *SupportWorld*.

Q: What are the best practices and "must-haves" associated with SLAs (service level agreements), OLAs (operational level agreements), and UCs (underpinning contracts)?

A: The first step to creating good SLAs and OLAs is opening a dialogue with the stakeholders and differentiating their wants from their needs. Good SLAs must clearly define all the terms included within, specify the service, differentiate the times discussed (including response time for each severity level), and provide realistic targets. Don't forget to include some information about how and when communications should happen.

You can find much of the information you seek in some documents from our Interactive Library (www.ThinkHDI.com/library):

- "Creating SLA and OLA"
- "Can Service Survive Without SLAs?"
- "The Help Desk Service Level Agreement (SLA) Template"

You will also find a good basic checklist for elements of an underpinning contract in the Library. That list will help you spell out who the contacts are and what is/is not provided by the vendor.

Q: What is the difference between an urgent call and an important call?

A: *Urgency* is used to indicate the necessity of responding to and resolving an incident within a particular span of time. More formally, urgency reflects the time available to fix or restore a service before the impact is felt by the business. Your SLA should define what that time is. *Importance* is not a common term. Did you mean *priority*? If so, we can illustrate the difference by pointing out that *not every high priority is urgent*. For example, it may be a very high priority that the CEO gets assistance next Thursday before a trip overseas, but it may not be highly urgent, meaning that the CEO does not require assistance in the next two hours.

Q: As a small help desk in higher education, we have always operated in a flat structure, where end users would contact technicians directly via phone, e-mail, or personal visit. We have recently been asked to move to a tiered help desk structure in hopes of improving overall customer satisfaction. What is the best method for educating our end users about the new system?

A: I went through a similar transition some years ago. It can be difficult, at first, to explain the benefits to customers, but what you have is a wonderful opportunity to market your services. Some strategies for this might include:

- Giving a short talk at departmental staff meetings to explain the new system,
- Setting up a small display at a high-traffic location (near the cafeteria or main lobby, perhaps) for an hour or two each day for a week, to answer questions and explain the new system, or
- Posting flyers on doors (if it's permitted) so people see them as they move about the building.

Be sure to have a clear set of talking points that everyone on your team is familiar with. Always start with what benefits the customer, such as, "You won't have to worry that someone is out sick or on vacation anymore. You can always count on your call being answered."

There's a document in the Members' Toolbox – "Fundamentals for Building a Tiered Support Structure" (www.ThinkHDI.com/members/Toolbox) – that might help you make this transition. Good luck!



We invite you to visit HDIConnect (www.hdiconnect.com), where you can post questions to the Message Boards for input from others who are addressing the same issues.

If you'd like to ask Roy a question, visit www.ThinkHDI.com/members/askexpert. Please include a brief description of your operation, the number of staff in your operation, and the number of contacts your department handles each day (phone, e-mail, chat, etc).

About the Author

Roy Atkinson is HDI's senior writer/analyst. He is an HDI-certified Support Center Manager and a veteran of both small business and enterprise consulting, service, and support. In addition, he has both frontline and management experience. Roy is a member of the conference faculty for the 2011 HDI Annual Conference & Expo and is known for his social media presence, especially on the topic of customer service. He is also the outgoing president of the HDI Northern New England local chapter.



HDI Local CHAPTER LISTING

STATE	CITY	CHAPTER NAME	CHAPTER CONTACT	POSITION	E-MAIL ADDRESS	PHONE NUMBER	CHAPTER WEBSITE
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From the Bookstore



ITIL Lite: A Road Map to Full or Partial ITIL Implementation By Malcolm Fry

For many reasons, not every organization can adopt the whole of ITIL v3. This book identifies the essential components and explains how to select the appropriate components for implementation. It is also the ideal resource for those seeking to make the transition from v2 to v3, as it discusses how to use gap analysis and process maturity modeling to harness what you've already implemented.

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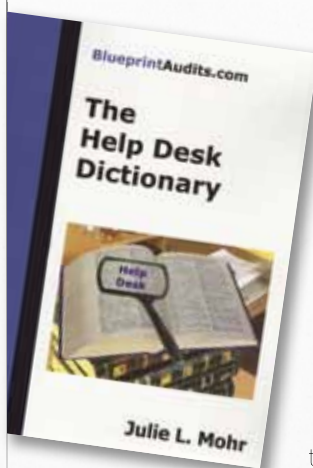
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Who Stole the

By Malcolm Fry

What happened to infrastructure management? Where did it go? Did I miss the memo? There seems to be an insidious scheme afoot to eliminate infrastructure management from the IT lexicon. Nobody seems to consider it important anymore, but not so very long ago, in its halcyon days, infrastructure management was the phrase on everybody's lips, as the key component in what is still called ITIL. And what does ITIL stand for? The Information Technology *Infrastructure Library*.

So where has it gone? Has it been usurped by that young upstart, IT service management (ITSM)?¹ Or are they indeed one and the same? We need to make up our minds, because as far as I am concerned, you can get by with a well-managed infrastructure and basic service management, but you cannot survive with the reverse scenario: strong service management and a weak infrastructure.

Let's quickly review the ITIL v3 definition of the IT infrastructure:

All of the hardware, software, networks, facilities, etc. that are required to develop, test, deliver, monitor, control, or support IT services. The term IT infrastructure includes all of the information technology but not the associated people, processes, and documentation.²

That's some list. It covers everything that has to be in place so ensure that when users fire up their workstations in the morning, all of the required technologies are in place and functioning correctly. Infrastructure management is the bedrock upon which the rest of IT is constructed. But are we guilty of putting too much emphasis on service and not enough on infrastructure management?

Bringing Infrastructure Management Back in Focus

In the mid-1980s, when the first iteration of the IT infrastructure library was being developed, infrastructure was so important, it was part of the title. However, twenty-five years ago, the infrastructure was far less complicated. With today's complex infrastructure, we need to bring infrastructure management back in focus.

Infrastructure management fits into the ITIL lifecycle at three distinct locations:



Say you were building a house. You would first need to understand the customer's needs—how many bedrooms, which direction the customer wants the house to face, and so on—and draw up a blueprint. That's the consult phase. The next step is building the house, installing the interior fixtures and fittings, and landscaping the exterior, ensuring that the customer's needs and expectations are met and your work complies with building regulations.

Building a house is not unlike managing IT service and support. First, make sure you understand the customer's needs and expectations; next, build an infrastructure that complies with governance regulations; then, develop your service level agreements, operational level agreements, and so forth. And just as a poorly built house can be a disaster, a poorly designed and badly built infrastructure could likewise be catastrophic.

Consult for service strategy and service design. The first key role that infrastructure management plays is that of consultant. In an ideal situation, the strategy for a new service would be developed independent of current services. In reality, we are often constrained by some elements within the current infrastructure. For example, back when organizations began phasing out their mainframes, it meant that any strategies for upcoming services had to exclude mainframes from their evaluations. Service strategy needs to consult with infrastructure management to determine:

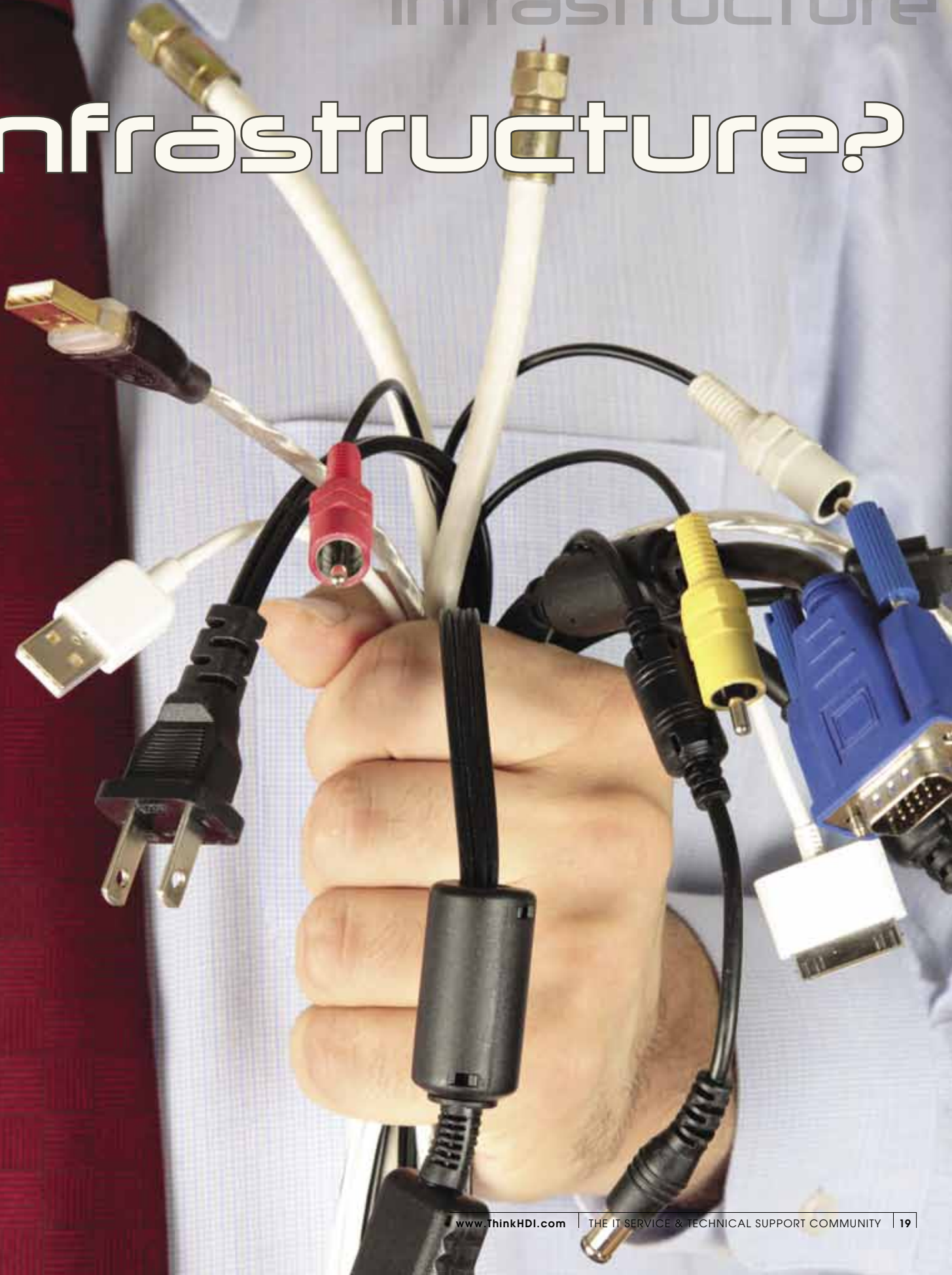
1. The scope of current technologies,
2. The plans for new technologies that are to be introduced,
3. The constraints of current technologies,
4. Which contracts relate to current technologies, and
5. The configuration of current technologies.

It is a myth that a strategy can be successfully developed without taking into account current services because most new services will have to work in conjunction with the current services. Therefore, data from current services provide a valuable resource

¹ Before we go any further, let me say that I do believe that service management is a vital component for providing top-level IT services. It establishes the criteria by which infrastructure management can build a "fit for purpose" infrastructure.

² Office of Government Commerce, *Service Strategy* (The Stationery Office, 2007), p. 243.

Infrastructure?



for enabling service strategy and helping you make decisions from a practical, as well as an esoteric, standpoint. In fact, in the current global financial climate, a new service strategy should require the service to work within the current infrastructure. Without infrastructure management, it would be very difficult for service strategy to make well-rounded strategy decisions that deliver “fit-for-purpose” solutions.

Service design is a complicated stage, littered with traps and that can be avoided through good infrastructure management. And when it comes to service design, infrastructure management has two roles to play, as consultant to the design phase and builder/architect of the infrastructure. A service portfolio and demand management are two key components that derive from the service strategy, but these have to be converted into plans and projects to facilitate the implementation of a new service. This is where infrastructure management comes in: consult with service design to help to produce plans, based on reliable, accurate data, that will integrate with the current infrastructure and, at the same time, retain the integrity of the current infrastructure. This particularly applies to demand management because although a proposed new service could work utilizing current technologies, there may not be enough capacity to meet the demands of the proposed services. Who knows what capacity is available? Come on down, infrastructure management.

Build a “fit-for-purpose” infrastructure. Once the service design team has produced the plans, then the infrastructure management team has the difficult job of building the infrastructure that will successfully support the new service. This not only means purchasing and implementing technologies, but also creating an environment that will meet the customer’s requirements. The service design should include service level management, which, in turn, should include service level agreements that specify the levels of service that must be achieved once the new service has been implemented. In addition, service design is responsible for creating a service catalogue that identifies which IT customers will use the new service.

Creating SLAs and a service catalogue without having a true sense of the infrastructure could result in an underperforming service, which could antagonize your customer base and have an overall negative effect on business services. A well-managed service should monitor the infrastructure on an ongoing basis and, as such, be able to quickly provide service design with any required data concerning the current infrastructure.

That’s the easy part. Now the infrastructure management team has to build the environment into which the new service must fit. There’s

real danger associated with this step, because lack of knowledge of the current infrastructure could have three outcomes:

1. Late implementation of the new service,
2. A service that does not meet service levels, and/or
3. Unnecessary expenditure.

Late implementation is often the result of new additions to current infrastructure that didn’t gel with the current infrastructure. When a service fails to meet its service levels, it’s often because the service design team did not consult with the infrastructure management team and there was not enough information to determine whether the current infrastructure could cope. These situations usually lead to unnecessary expenditures.

Building an environment has become more and more complicated as an increasing number and variety of new technologies have entered the market. The current infrastructure often has to be altered to accommodate the technologies required by the new services, from smartphones to cloud computing. For example, it may be that to transition a new service on a system requires that the web browser currently in use needs to be upgraded to a specific release of the web browser on every remote device. Who has which release at the moment? Are all of the remote devices capable of installing the new release? Exactly what is the scope of this transition? These are some of the questions that would need to be answered by the infrastructure management team. This should be a straightforward task, but without infrastructure management the entire transition is a time-consuming gamble.

Once the infrastructure has been built, it has to be implemented. This is the point where service transition and infrastructure management meet. Bear in mind here that if a request for change was submitted at the beginning of the project, then planning for implementation would have been an ongoing task for infrastructure management and not the last-minute panic it usually is. It is the responsibility of infrastructure management to ensure that the resources for new services are successfully implemented through change management. It should be clear by now that a well-managed infrastructure will handle this task better than a mismanaged infrastructure.

Support the environment. The final touch point for infrastructure management is its relationship with service operation, where services are monitored and maintained. This is a crucial step for IT because the performance of implemented services must be planned for and maintained to meet and exceed agreed upon services levels.

One underrated relationship is that between infrastructure management and problem management, where the root causes of problems are investigated and corrected. Without infrastructure

management, isolating and identifying root causes takes longer, and the actions taken to eliminate the problems often cause more problems. Service operation and infrastructure management need to work closely together to maintain and improve current services.

Achieving Balance

So why is it that so many organizations no longer place high emphasis on infrastructure management? I am not advocating that service management be taken less seriously, only that infrastructure management not be forgotten and that it should be restored to a place of importance. If you look at some of the components that relate to infrastructure management, the need for proper focus revolves around capacity management, availability management, technical management, applications management, IT operations management, configuration management, and event management. These components do not fit easily into service management because these areas are primarily concerned on maintaining and building the environment so that IT service can concentrate on managing the customers. So, to whoever stole infrastructure management, watch out because we are coming to take it back!

Moving Forward with IT Service Management

Now, with that off my chest and infrastructure management back in its rightful place, what does the roadmap look like going forward? First of all, keep in mind that if the car doesn't work, the roadmap is useless. Likewise, be sure that your infrastructure can deliver before you talk to your customers. Remember, customers and users are often confused because the customers own the users (hint: cUStomERs). Generally, service levels are agreed upon with the customers, but it is the users that utilize the infrastructure. Begin by recognizing that the infrastructure is a critical component in supporting both customers and users. The key is understanding which infrastructure components are required to support your individual services (i.e., what is the infrastructure required to support accounts payable?).

ITIL is a lifecycle approach, which means that we have to be able to measure and manage the performances of the services that we provide. For example, we used to manage capacity by components (i.e., do we have enough server power?). Now we need to measure by the services, (i.e., do we have enough end-to-end capacity to support stock control?). Again, this means that we must have control of the infrastructure. A well-built configuration management database could be the key here. We need to acknowledge the critical role that infrastructure management plays, then identify the infrastructure, apply ownership to that infrastructure, and make managing the infrastructure a priority.

Before we make the mistake of becoming too infrastructure-centric, we must keep in mind that service operation is still a

vital component. If the infrastructure is the heart of ITSM, then service operation is responsible for making sure that the heart stays healthy, fit, and capable. Why? Because with functions such as change, incident, problem, and request fulfilment, service management is the finger on the pulse of the infrastructure, monitoring the heartbeat and ensuring ongoing health.

If you have a really good infrastructure in place, you could get by without service management. If you have terrible infrastructure management, service level management is not going to get you anywhere. It's a balance. And, it's SIMPLE: **Service-based Infrastructure Management Processes Lead to Excellence.**

Malcolm will be presenting on the current state of ITIL at the 2011 HDI Annual Conference & Expo (session 310). For more information, visit www.hdiconference.com.



About the Author

As a recognized IT industry luminary with over forty years of experience in information technology, Malcolm Fry, an independent executive advisor, possesses an unparalleled breadth of knowledge on and experience in IT business and technical issues. He is the author of many publications on IT service and support, including *ITIL Lite: A Road Map to Full or Partial ITIL Implementation* (The Stationery Office, 2010), and he is a highly sought-after source for technology journalists. Malcolm was also a member of the ITIL v3 Advisory Group and a mentor for the *Service Operations* book. In April 2009, he was awarded the prestigious Ron Muns Lifetime Achievement Award for IT Service and Support.

How to Avoid the Seven Deadly Sins of IT Service Management. Here are the seven deadly sins of IT service management, along with their corresponding virtues and warning signs.

SIN	VIRTUE	SERVICE MANAGEMENT WARNING SIGNS
PRIDE	Humility	Do you produce statistics that show how great you are?
GREED	Generosity	Do you think your budget is low compared to other IT budgets?
ENVY	Love	Do you ever wonder why everybody else gets the new technology and you don't?
WRATH	Kindness	Have you ever been furious with the fool that implemented the crazy system that is overloading you with incidents?
LUST	Self-control	Do you spend time dreaming of what you could do if you had more of everything?
GLUTTONY	Temperance	Do you really need all of the technologies you have even when you do not use them?
SLOTH	Zeal	Are any of your team just cruising, rather than maximizing their abilities?

Stay tuned for my special series on the seven sins and warning signs in HDI's *Industry Insider*, beginning in February.

The ITSM Journey and the Realities of ITIL Adoption

By Patrick Bolger

ITIL v3 was officially launched in June 2007, after a three-year development period. Much has happened in the world over the past three years, which has slowed every business down considerably, yet research shows that in ITSM,¹ things are still moving along. Overall, 68 percent of ITIL (v2 and v3) adopters report having achieved low to medium levels of maturity, with 32 percent claiming high levels of maturity. But a number of other indicators suggest that IT still has some way to go before it can claim to be fully integrated with business goals.

Greatest Challenges to ITIL Adoption

The challenge to ITIL adoption can be grouped under three headings:

- Insufficient resources (time, people, and budget)
- Cultural resistance to change
- Business sponsorship

Insufficient Resources

ITIL adoption initiatives often stem from the desire to do “something” to break the cycle of firefighting that consumes IT resources. ITIL works, but it’s a challenge adopting a new way of working when you are struggling to keep the lights on.

Cultural Resistance

Evidence suggests that the majority of IT organizations remain focused on technology, are generally not receptive to the benefits of process, and do not have a natural affinity for managing services. This is one of the greatest challenges associated with ITIL adoption.

Business Sponsorship

ITIL emphasizes the importance of securing backing from the business and while this is desirable, the business may not see the value and may view this as yet another IT project that promises much, but delivers little. If IT wants a place at the boardroom table, it must show that it can deliver the improvements and efficiencies that capture executive attention.

The ITSM Journey

When planning any initiative that involves continual improvement, there are a few things to consider before you start. Obviously, we need to know our starting point, where we are

aiming to get to, how much effort we can afford to expend, and how long we anticipate it will take to reach our goals. Along the way, we are likely to encounter obstacles that we didn’t plan for, but if we don’t take the time at the outset to consider and plan our progress, we are not very likely to reach our goals in a reasonable timeframe, if at all.

This prompted me to look at ITSM as a journey, with IT growing and taking on new cultures as it evolves through each maturity stage.² The first phase encompasses the initial steps out of “chaos,” with a focus on using the ITIL processes to bring order, enabling IT to manage the technology. The second phase, technology to service, demands the greatest cultural shift, but can be the most rewarding, moving IT up the ladder of influence in the business and closer to demonstrating value.

One aspect of ITIL v3 that has certainly given IT food for thought is its orientation toward business services. What is now becoming apparent is the need to focus on people, for they are the enablers of process. The main drivers for implementing ITIL (v2 or v3) are the same: improve service quality and increase customer satisfaction. Process can only take you so far. It is people that make the difference between poor and excellent service. The service desk is IT’s shop window. By ensuring that it is manned by the right staff, with the right attitude and the right tools, IT can tackle service quality and customer satisfaction head on, instead of expecting processes alone to make a difference.

¹ In September 2009, Hornbill released its “ITIL: State of the Nation” research report. Over 500 respondents, from the United States and United Kingdom, completed a detailed survey that examined the drivers for ITIL adoption, the processes implemented, and the benefits realized. To download the full report, visit www.hornbill.com/campaigns/itil-state/.

² I have covered the ITIL journey in greater detail in a white paper series entitled “Chaos to Value: The ITSM Journey.” To download this resource, visit www.hornbill.com/myhornbill/download=whitepaper%2Fchaos-value/.



About the Author

Patrick Bolger is Hornbill’s chief evangelist. An industry veteran and thought-leader, he is dedicated to working closely with customers, industry organizations, and IT luminaries to identify, communicate, and promote IT best practices.



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- 505:** Building and Sustaining Service Operation Excellence
- 506:** Managing Cloud Services from a Business Perspective
- 607:** Categorical Chaos: Selecting a New Taxonomy for the Service Desk
- 702:** In Pursuit of Customer Service Excellence
- 705:** Managing Up: Key Techniques for Working with Your Senior Manager
- 801:** How Knowledge Management Transformed the Boise State University Service Desk



Maximize Team Performance

People are your greatest asset. Learn key strategies for motivating and managing your team.

This track focuses on the key principles of leadership, team building, motivation, and effective communication. These sessions will cover best practices for handling key people issues, such as staffing, resource maximization, and performance management.

- 103:** Man vs. Machine: Dealing with Dysfunction
- 109:** Champagne Appreciation on a Beer Budget
- 204:** Trench Warfare: Tactics for Avoiding Miscommunication
- 205:** The Nuts and Bolts of Managing an International IT Team
- 306:** The Chemistry of Conflict
- 404:** Let's Make a Deal: The Delegation Game
- 405:** Culture Shock! Getting to Know the World
- 507:** Tune Your Team for Performance
- 606:** $X + Y \div \text{Boomer} = \text{Balancing the Generation Equation}$
- 704:** Question-ABLE Leadership
- 706:** Building a Resilient Workforce
- 802:** The Impact of Trust on Performance and Profitability

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- 107:** Managing with Metrics: Bridging the Gap Between Metrics and Performance
- 209:** Client Support and the Balanced Scorecard: Supporting the Changing World of Work
- 301:** The "Dirty Dozen": Common Survey Mistakes
- 410:** Metrics That Matter
- 501:** Service Quality: The Metric for Service Management
- 502:** Designing an ITIL-based Management Dashboard
- 609:** You Call That a Report?
- 610:** Desktop Support 101: Staffing Levels
- 701:** Measuring Success!
How to Implement IT Performance Management
- 806:** Metrics and Measurement: How Am I Really Doing?



Service Management: Theory and Beyond

Stop talking and take action. Learn real-world approaches to improving service management.

This in-depth track goes well beyond theory in developing a working understanding of approaches to improving service management. Service management is not just about ITIL. These sessions will explore a number of the most popular frameworks, methodologies, and approaches to service management with a complementary blend of theory, application, and real-world case studies.

- 108:** Multisourcing and the Message for Innovation
- 110:** The Problem with Problems: Develop Solutions Through Service Level Management
- 201:** KCS at Genuine Parts Company: A Case Study
- 309:** 15 Minutes to Learn It!
- 401:** Creating an IT Service Management Success
- 408:** Chaos to Value: The ITSM Journey
- 508:** Blended Quality Models: A Service Desk Transformation Program
- 604:** The Blade of Negotiation: Cutting Through to Success
- 703:** Desktop Support Town Hall Meeting
- 709:** From Helpless Desk to Super Service Desk



Create Customer Connections

The customer's voice is strong and powerful. Make sure they say great things about your service.

Customer satisfaction is a key performance indicator for support services. This track, combining case studies, practical concepts, and skills-based sessions, provides support professionals of all levels with key strategies for developing a proactive approach to service quality. Learn how to create effective customer communications, empower your customers with new technologies, and measure their satisfaction with the services rendered.

- 106:** Customer Satisfaction Is Dead
- 210:** Building Rapport
- 302:** Maximizing the Value of Customer Feedback
- 303:** Optimizing KPIs in an International Environment
- 406:** Customer Satisfaction Red Flags
- 409:** Marketing Through Your Desktop Support Services Team
- 503:** The WOW! Factor: Telling Your Help Desk's Story
- 605:** Great Customer Service for the Microwave Generation
- 805:** 21 Great, Unexpected Customer Service Techniques



Optimize Performance Through Technology

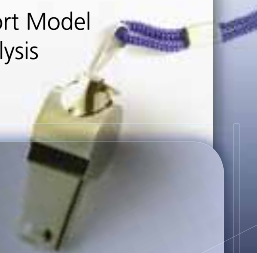
Select and implement the right technologies to significantly impact your help desk's performance.

The concepts and case studies presented in this track focus on best practices for using support technologies to optimize support center performance. Learn how to select and implement the latest tools and technologies and discover how to leverage wikis, virtual support, and automation with performance improvements. Also, get an inside look at emerging virtual technologies that will directly impact the support services of the future.

- 102:** Searchability and the Semantic Service Desk
- 203:** New Strategies for Integrating Enterprise Search Solutions
- 307:** Block This! Real-World Uses of Social Media for the Service Desk
- 403:** Integrating Chat, Increasing Capacity
- 510:** Implementing an Incident Tracking Tool
- 601:** Collaborative Support: A New Remote Support Model
- 707:** From Manual to Automated Root Cause Analysis
- 807:** Building an Effective Call-Routing Plan

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IT Frameworks, Standards, and Models: A Recipe for Value

by Julie Mohr

When chaos takes over our daily lives, the signs are obvious. We feel overwhelmed, exhausted, and despair of fulfilling all of our competing obligations. As individuals, we can adopt frameworks that help us prioritize our work, identify key tasks, and complete our work one item at a time. To do this, we create checklists, multitask, assign work to other family members, and walk away from tasks that we decide are not as important. As it turns out, IT is not so very different.

Frameworks existed long before there was technology. So why is it that so many organizations have only recently now begun to evaluate and adopt IT frameworks? The easy answer is structure. In order to manage a complex system or value network, organizations need to adopt a structured environment to achieve operational efficiency and effectiveness as well as understand how to measure performance and continuously improve. Let's examine some of the most popular frameworks and discuss how they can work together in service to IT governance.

ITIL

IT organizations have rapidly evolved to keep up with the pace of technology, but, in many ways, we have fallen short of the expectations of the users of the technology we create and support. It is understandable. We often have little influence over setting and managing expectations and poor visibility into what we should prioritize in order to best serve the business. The adoption of a framework provides structure to an IT organization, and one of the reasons ITIL has become so popular is that it provides that structure and helps us manage both the environment and our customer's expectations.

ITIL is not the only game in town. Yes, it is the *de facto* standard when it comes to the adoption of service management, but service management is not the only thing we need guidance on in order to run IT like a business. Take, for example, IT governance. IT organizations are constantly dealing with changes to laws and regulations that impact the way they can conduct business. Whether it is HIPAA for patient information, Sarbanes-Oxley for publically traded companies, or all the new regulations that have handed down by Homeland Security, these laws and regulations were developed to protect the rights and information of the consumers of services, and corporations need to demonstrate compliance with these laws and regulations. Because customer data resides on IT systems, IT plays an important role in demonstrating compliance.

The ITIL framework provides an overall view of the service lifecycle and will help us to identify regulatory constraints and design the best possible service for the business. We can also learn how to improve the service and measure its effectiveness. With regard to compliance, there are three ITIL processes that are particularly helpful: change management, security management, and service continuity management. However, given its limited view of risk management, ITIL falls short from helping an IT organization to adopt a holistic IT governance approach.

COBIT

COBIT, or Control Objectives for Information and Related Technology, is a framework that focuses on the management of an IT organization through establishing the controls necessary for IT governance. This framework is used by IT organizations and compliance officers to assess the strength of the controls associated with the organization's strategic direction. Picture a ship with a captain at the helm and many deckhands working to keep the ship afloat. Governance provides the captain with the information that allows him or her to keep the ship on course. The concepts of direct and control are at the heart of IT governance.

Why would an organization use COBIT? COBIT helps us identify business goals, align IT goals with the business's goals, and assess the strength of the practices that support the IT organization's goals. COBIT also helps to define a desired target state. Once we fix that strategic direction, we can then leverage ITIL to help us improve what needs to be fixed. In other words, ITIL helps us to get to that target state.

For example, say the business wants to improve customer orientation. The business goal is mapped to the IT goal of improving customer satisfaction, which is then mapped to the IT processes related to managing the service desk and incidents. Using COBIT, we can assess the current performance level of the IT process and identify where we need to be to best support the business goal. The controls or measurements allow us to collect information from the process, and when we identify a weakness, we can turn to ITIL to help us understand how to better manage the service desk and incidents process.

Many organizations that leverage ITIL have a difficult time deciding where to begin. Incident management and change management are usually high on the list of things to fix, but how do we really know what to fix, and in what order? COBIT spans a larger portion of the IT organization and covers planning, organization, delivery, support, acquisition, implementation, measurement, and evaluation. Its four process domains provide a more comprehensive method for evaluating the IT organization as a whole, determining its weaknesses, and aligning improvement opportunities with those activities that best support the business strategy. COBIT is a vital component of overall good governance, which itself helps to manage risk, manage performance, and manage resources.

ISO20000

Standards provide a method for organizations to evaluate their performance against defined requirements. The ISO standards provide guidance on the best practices for a given industry. ISO9000 is the standard for manufacturing, ISO17799 for security. For IT service management, the standard is ISO20000. The scope of ISO20000 is similar to ITIL; it serves as a yard stick for measuring the success of an ITIL implementation as it compares to the standard. For example, ISO20000 asks a series of questions about change management, including "Do you have change management in place?" and "Is it documented?" If you answer "no" to any of these questions, these are weakness that must be addressed before your change management program can be deemed successful.

ISO20000 certification is a lengthy, expensive, and exhaustive process. And though certification provides a competitive edge in the marketplace, it may not be the right path for every IT organization.

Balanced Scorecard

The balanced scorecard is a business management framework that evaluates the health of an organization across four domains: financial, customer, internal processes, and learning and innovation. By defining metrics for each quadrant, the business can paint a picture of the organization's overall performance.

The value of the balanced scorecard is in seeing how your organization's performance in one quadrant can affect its performance in another. Balancing all four quadrants will help ensure that your organization is prepared for success.

The balanced scorecard is one of the most difficult frameworks to implement because of the lack of control over the information that feeds the scorecard. IT governance is one way to collect better information that helps you understand how successful your strategy is at driving organizational performance. In particular, implementing controls from COBIT would further enable the organization to more successfully capture relevant information to populate the balanced scorecard.

Integrating Frameworks

How do all of these frameworks fit together? Each one has its proper place in any organization. Depending on what the organization is trying to achieve, one particular framework or standard may be more important than another. When the dynamics of the environment change or other issues take priority, a different framework may take priority.



IT Governance

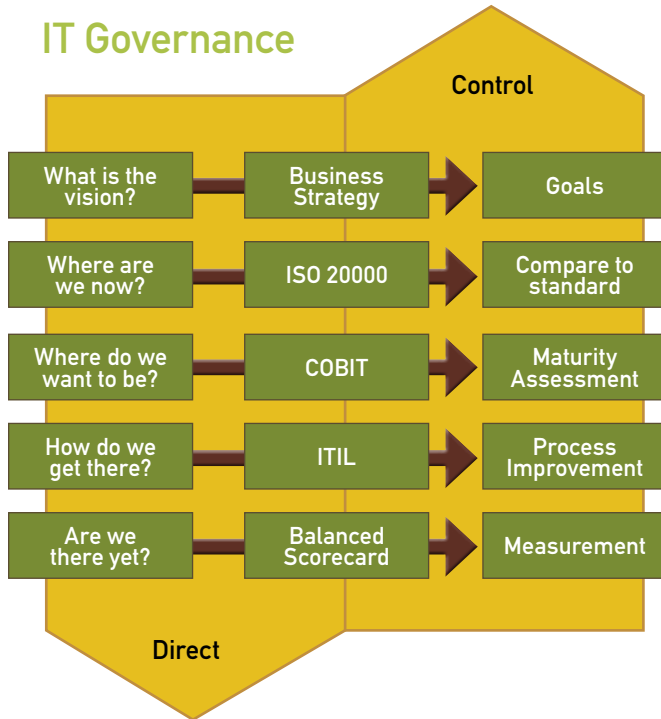


FIGURE 1: COMBINING FRAMEWORKS

To better understand how these different frameworks and standards fit together (Figure 1), start with the overall concept of IT governance. One of the major goals of IT governance is establishing direct controls in the organization. If an organization has some of these controls in place, they may decide to evaluate the current level of maturity of IT governance and improve from there. ITIL's CSI model provides a methodology for assessing the current state and determining how to make improvements. The CSI model asks five questions:

1. **What is the vision?** (Most organizations look to their senior management to set the strategic vision and goals.)
2. **Where are we now?** (Use ISO20000 standards to identify the organization's weakness.)
3. **Where do we want to be?** (Use the COBIT process maturity model to identify the desired maturity model.)
4. **How do we get there?** (Look at the ITIL framework.)
5. **Are we there yet?** (Apply the controls in COBIT that feed information to the balanced scorecard.)

This is just one creative way in which an organization can leverage multiple frameworks. Each has its strengths and weaknesses, and each requires a certain level of knowledge and competency to successfully engage the organization in change.

Organizational Change

The success of any framework adoption depends upon your organization's ability to successfully engage in change. Management commitment, communication, training, well-defined vision, and a guiding coalition all affect how well your organization embraces change. Kotter's eight steps to organizational change is a great tool for viewing change holistically. This methodology will not help you identify the right framework to use, but it will help your organization incorporate changes into a project with defined goals and objectives.

To successfully manage an IT organization and the services that it provides to the business, the IT service provider must use multiple frameworks to identify weaknesses and make improvements that benefit the business. ITIL, COBIT, ISO20000, Six Sigma, project management, Kotter's eight steps to organizational change, CSI, and the balanced scorecard—all are great tools for driving greater value to the business. Restricting the organization to only one tool limits the possibilities for improvement; trying to use too many dilutes the overall effectiveness of any or all of them. Just like a chef, having more tools doesn't help you cook a better meal. You need the best recipes, the best ingredients, *and* the right tools for the job. This takes with practice, training, experimentation, and experience. And it never hurts to bring a master chef along for the ride.



About the Author

Julie Mohr is the principal research analyst and author at **BlueprintAudits.com**. She is a passionate organizational change advocate, providing imaginative insight and dynamic leadership that transforms organizations into best practice, customer-focused environments through knowledge management, ITSM, IT

governance, organizational enhancements, process re-engineering, and service level management.

Julie has developed an IT governance framework and audit methodology that is used by thousands of organizations worldwide to identify weaknesses, develop improvement plans, and implement IT governance. She is the author of *The Help Desk Audit: Blueprint for Success* (BlueprintAudits.com, 2003) and *The Help Desk Dictionary* (BlueprintAudits.com, 2006).

Make It Better!

Using ITIL's Continual Service Improvement Model

by Jim McKennan



You may be accustomed to seeing my Service Doctor articles in *SupportWorld*, but I'm not Dr. Jim in this issue. This time I am just plain old Jim the IT Management Consultant, writing about a subject that interests me: continual service improvement.

W. Edwards Deming (1900-1993), an American statistician best known for his work with Japanese manufacturers after World War II, is the Father of Improvement. He showed the Japanese how, by using statistical process control (SPC), they could improve the quality of products they produced. Improved quality coupled with low cost increased the demand for Japanese products in the global marketplace, and the rest, as they say, is history.

It wasn't until the end of his life that Deming's work gained recognition in the United States. For this, we can thank the Ford Motor Company. In the early 1980s, Ford was sourcing transmissions from both Japan and the United States. Even though both transmissions were built to the same specifications, customers preferred the cars with Japanese transmissions. Ford's engineers couldn't understand why customers preferred the Japanese transmissions, so they dismantled one of each. The American transmission performed as expected, but the Japanese transmission performed better, since the Japanese were able to build the transmission with smaller tolerances. The Japanese were obviously doing something right, so Ford recruited Deming to help it launch its quality improvement initiative. By 1986, Ford had surpassed GM to become the most profitable car manufacturer in the US.

So, how can IT "make it better"? In my consulting practice, I focus on the Information Technology Infrastructure Library (ITIL). One of the phases in the ITIL lifecycle model is continual service improvement (CSI), a collection of disciplines and methodologies that one can use to improve anything.

Why Do We Need to Improve?

Recently, I had a conversation with my boss, one that we have every year. You probably have one like it with your boss, too. Here is what she said to me: "Jim, you were way too productive last year. You travelled too much, visited too many clients, and generated too much revenue for the company. This year we want you to be about 12 percent less productive than last year." Before I could shout "Yes, I can!" I was rudely interrupted by... my alarm clock! Of course, I was dreaming. No one ever has that conversation about their performance. No matter how well we perform, we are always expected to improve, to perform "better" than we did in the past. The same goes for our services, processes, technologies, and employees.

What Should We Improve?

ITIL has devoted an entire lifecycle phase to continual service improvement (CSI). The name, however, is a little misleading. It implies that information technology (IT) should improve the services it delivers to the business. Of course, it should, but there is a multitude of areas we can focus our improving efforts on, including services, processes, technology performance, departments, and individual employee performance. This is a model we can apply to everything we do in IT.

How Do We Do It?

The ITIL core curriculum book on CSI¹ is over 200 pages long, so it would be impossible to do justice to the the subject in a short article. Let's just focus on some of the basic, high-level concepts.

What's In It For Me?

In order to improve, we must change the way we work. In general, people don't like change. Or, rather, they don't like to *be* changed. Countless studies have shown that to get people to change the way they work, you must explain the benefits to them and help them understand what they'll get out of it (i.e., "What's In It For Me?"). And you must also involve them in the process of creating the change you are trying to implement, so they are more likely to embrace the change than resist it.

Ownership

ITIL emphasizes the importance of assigning ownership to all services and processes. Ownership of CSI is no less important. So you will likely need to appoint a specific "manager" to make sure that improvement best practices are accepted and adopted by all areas of the organization. This manager must have specific quality management methodology training and should be high enough in the organizational structure to command authority, influence the behavior of others, and ensure their compliance. The CSI manager will be its owner and chief advocate.

CSI champions must be embedded in the organization and should include executives, middle management, and the actual worker bees. Eventually, CSI will become just another part of the way IT does business.

The Backbone of CSI

Service level management (SLM) processes are the backbone of CSI. Having business requirements for services and service levels is essential for establishing agreements between IT and the business. This ensures that everyone understands the level of service required for the business to be successful. Whenever we fail to reach the goals set forth in the service level agreement (SLA), the service level manager (SLM process owner) will be required to create and institute a service improvement plan (SIP) to get the service level back up where it belongs. The CSI manager can play an important role here, by helping the service level manager develop effective SIPs.



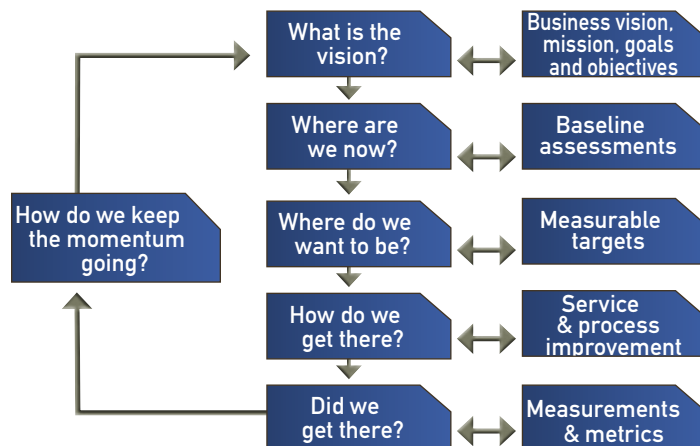
Plan, Do, Check, Act

For steady, ongoing quality improvement, Deming can't be beat. The Deming Cycle can be used for implementing CSI initiatives, improving services, and improving service management processes. It has four stages or steps:

- **Plan:** Planning for improvement initiative
- **Do:** Implementation of improvement initiative
- **Check:** Monitor, measure, and review services and service management processes
- **Act:** Continual service and service management improvement

The CSI Model

The CSI model, as laid out in the CSI book, provides some general guidance on what steps to take to ensure successful improvement initiatives.



Source: Continual Service Improvement (*The Stationery Office*, 2007)

Answering this series of questions help us make sure we are organizing our CSI activities effectively.

- *What is the vision?* We must look to the business and business executives to provide the vision, goals, objectives, and guidance necessary to make sure we are on the right path.

¹ Office of Government Commerce, *Continual Service Improvement* (The Stationery Office, 2007).

- *Where are we now?* To answer this question, you must conduct a baseline assessment of your current level of maturity, focusing on the processes or services you want to examine. A baseline assessment will give you a point of reference for measuring the progress and success of your improvement initiative. Many organizations bring in an experienced consultant (with no emotional attachment to your company's services or processes) to perform such assessments. CMMI (Capability Maturity Model Integration) is one popular assessment tool.
- *Where do we want to be?* The results of your assessment should tell you what needs improving. Set measurable targets for whichever area(s) you decide to improve.
- *How do we get there?* This is where you implement your service improvement plans (SIPs) or process improvement plans (PIPs). The Deming Cycle is particularly useful for this step.
- *Did we get there?* Develop metrics to measure the results of your SIPs or PIPs so you can compare them to your baseline and see how much you have improved.
- *How do we keep the momentum going?* That's easy! Give the improvements time to stabilize and then answer the questions again to see what else you can improve. The cycle never really ends.

The 7-Step Improvement Process

One of CSI's fundamental concepts is measurement and CSI uses the 7-Step Improvement Process, along with the Deming Cycle and the CSI model, for just that purpose.



Source: Continual Service Improvement (The Stationery Office, 2007)

To begin this process, start by identifying the vision, strategy, tactical goals, and operational goals, just as you did with the first steps in the CSI model.

1. *Defining what you should measure.* This should be defined in the service strategy and service design phases of the lifecycle. It corresponds to the *Where are we now?* question.
2. *Defining what you can measure.* This step is related to the *Where do we want to be?* and *How do we get there?* questions. It is defined in the service design and service transition phase of the service lifecycle and it entails identifying new service level requirements and performing gap analysis to identify improvement opportunities.
3. *Gathering the data.* Data is gathered during the service operation phase in the service lifecycle. The raw data corresponds to the *Did we get there?* question.
4. *Processing the data.* The purpose of this step is simply to make the data consistent for comparison purposes. We can then begin data analysis.
5. *Analyzing the data.* Data analysis helps us better understand trends and service gaps and their impact on the business. Analysis converts data into information.
6. *Presenting and using the information.* Here we can address the *Did we get there?* question by formatting, packaging, and presenting the information to the various stakeholders. Be sure to present the information in the format required by each stakeholder.
7. *Implementing corrective action.* Now we have more than just data or information—we have knowledge. Knowledge can be leveraged to make improvements, establish a new baseline, and begin the cycle again.

Of course, we haven't covered everything about continual service improvement; just some of the basic high-level concepts that may help whet your appetite for improvement. Because your boss will never say, "You work too hard. Be less productive than you were last year!"



About the Author

Jim McKennan is often recognized for his highly developed customer service skills, as well as for being an adept call center manager, speaker, and award-winning sales and IT professional. Jim is a senior consultant with Pink Elephant and is active in the Sacramento HDI local chapter. He is also the past Western

region director of the HDI Member Advisory Board and a member of HDI's Support Center Certification Standards Committee. Jim holds a BA in psychology from California State University.

Buyers' Guide:

ITIL-Compliant Service Desk/Help Desk Software

by Roy Atkinson

Buying a new service desk management solution—or suite of tools—can be a daunting task in the best of times. In these days of uncertainty in IT budgets and the economy as a whole, it can be even more difficult. To mitigate the risks associated with such a large purchase, you should take into account your overall strategy for maturing the service desk/help desk and match it as closely as possible to the tools available. Remember, no two organizations are alike: so keep your organization's culture and strategic plan at the front of your mind as you begin your search for the right solution.

As with any software product, care should be taken to develop a full set of requirements and ensure stakeholder involvement. Keep in mind that now that self-service is a common component of many service desk systems, your stakeholders may include end users as well as IT staff, and your requirements may include factors that contribute to ease-of-use for non-IT employees. Also, many vendors now offer software-as-a-service (SaaS) versions of their products (partial or exclusive), and their licensing models may give you the option of subscribing to various software components or modules. This opens up the possibility of phasing in a solution that mirrors the ITIL maturity and roadmap of your organization.

To be considered ITIL-compliant, a product should use the basic impact/urgency matrix for setting priority (severity) and have the OTB (out-of-the-box) capability to integrate with ITIL processes and practices, such as incident, problem, change, and configuration management. Additionally, the tool may have the capability to either add—or integrate with—knowledge and asset management, and may have best practice templates for those and other processes.

Below is a partial listing of ITIL-compatible/ITIL-compliant product offerings.



Remedy (BMC, www.bmc.com)

The market leader in the large enterprise space is BMC Remedy, with a 36.1 percent share of over-4000-employee enterprises, according to Gartner.¹ Remedy is offered either as an on-demand (SaaS) or on-premises solution. BMC has held a strong position in the industry for years, and they continue to stand out.



Service Manager (HP, www.hp.com)

HP Service Manager has roughly a 20 percent market share of the enterprise service desk space.² The product has penetration and focus in the large enterprise, and HP's name recognition in IT departments cannot be discounted as a factor in its popularity.



Service Desk Manager (CA Technologies, www.ca.com)

CA Technologies has long been a player in the enterprise IT market. Its Service Desk Manager tool is offered in both on-premises and SaaS models, and it is PinkVERIFY-compliant with fourteen ITIL v3 processes.



Service-now.com (www.Service-now.com)

Over the past year, Service-now.com has become one of the frontrunners in the service desk world. Its subscription-based platform-as-a-service design allows organizations of various sizes and various stages of maturity to phase their implementations. Service-now.com is PinkVERIFY-compliant with eleven ITIL v3 processes.



ServiceWise ITIL
(TechExcel, www.techexcel.com)
TechExcel ServiceWise ITIL provides out-of-the-box incident, problem, change, and configuration management and supports additional processes. The ITIL version received PinkVERIFY certification in 2007. TechExcel also offers the ServiceWise HD product for basic help desk management.



SupportWorks ITSM Enterprise
(Hornbill, www.hornbill.com)
Hornbill SupportWorks ITSM Enterprise is also making progress outside of its traditional market area in Europe. SupportWorks is PinkVERIFY-compliant with eleven ITIL v3 processes. Hornbill also offers SupportWorks Essentials for smaller organizations.



FootPrints and TrackIt!
(Numara, www.numara.com)
Numara offers FootPrints for larger enterprises and Track-It! for smaller implementations. FootPrints is PinkVERIFY-compliant with ten 10 ITIL v3 processes.



Service Management
(Cherwell, www.cherwell.com)
Cherwell Service Management carries the PinkVERIFY stamp for eleven ITIL v3 processes, and is offered in both on-premises and SaaS licensing models.



ServiceDesk Plus
(ManageEngine, www.manageengine.com)
ManageEngine ServiceDesk Plus offers out-of-the-box incident, problem, change, and configuration management and issues alerts for SLA violations.



FrontRange ITSM
(FrontRange, www.frontrange.com)
FrontRange ITSM is geared toward process automation, and includes Pink Elephant certified best practice templates for ITIL support. The ITSM offerings are modular, and integrate on the FrontRange Foundation technology. The suite includes incident, problem, service catalog, request fulfillment, change as well as configuration management and discovery. The suite also includes a voice module for phone integration, and a self-service portal.



HelpStar and HelpSTAR Multi-Division
(HelpStar, www.helpstar.com)
HelpSTAR and its newest cousin, HelpSTAR Multi-Division, feature incident, problem, change, and configuration management, as well as knowledge management and SLA components.



Emerging: PIIT Viper
(Stone Cobra, www.stonecobra.com)
Stone Cobra's PIIT Viper builds on the Force.com platform. It integrates Kepner-Tregoe Resolve methodology and built-in mentoring and coaching tools, as well as knowledge-centered support. PIIT Viper also features Twitter integration.

HDI members, remember, you have access to articles and tools aimed specifically at making this choice easier, including several white papers. Good luck!



About the Author

Roy Atkinson is HDI's senior writer/analyst. He is an HDI-certified Support Center Manager and a veteran of both small business and enterprise consulting, service, and support. In addition, he has both frontline and management experience. Roy is a member of the conference faculty for the 2011 HDI

Annual Conference & Expo and is known for his social media presence, especially on the topic of customer service. He is also the outgoing president of the HDI Northern New England local chapter.

Can't We All Just Get Along?

CHANGING THE FACE AND STRUCTURE OF SUPPORT

by Deborah Monroe

Have you ever wondered why things are the way they are? Who defines the structure of an organization or, in this case, an entire industry? And just because it is that way now, who says that it needs to remain the same? Everything changes, and I think the time to change the way we structure our support organizations is now!

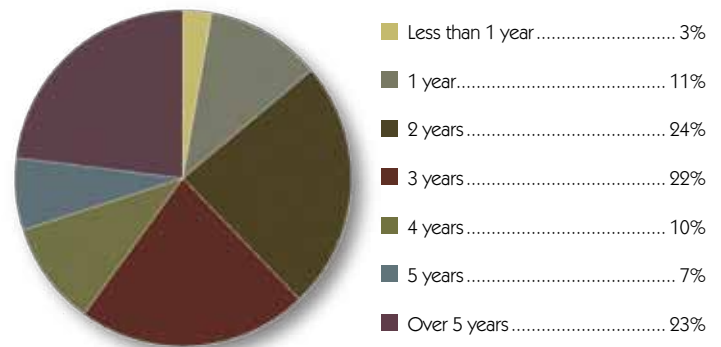
It would be impossible to count the number of support centers, analysts, desktop technicians, team leads, managers, and directors I have had the honor to train, consult with, discuss trends with, and mull over distresses and challenges with. After walking this IT road for so many years, there has been one constant amid all the change in our industry: the strong desire to keep level 1 and level 2 support separate. That is, the belief that the people on the phones need to stay on the phones and the sometimes prideful contempt that level 2 (desktop support) has toward level 1 (the support center).

As an expert in emotional intelligence, I focus on why people behave the way they do. Do you remember how difficult it was/is to sit on the phone for six to eight hours a day? And to do that five days a week, fifty-two weeks a year? Is it possible that maybe, just maybe, answering the phones all day is one of the most boring jobs on the face of the planet?

According to the 2010 HDI Practices & Salary Survey, we lose 60 percent of our level 1 analysts within three years of their start date (Figure 1). When we lose analysts, that loss includes any investments we made in their training and their knowledge of our culture, services, proprietary software, and systems. On the other hand, we sometimes see the opposite: analysts who quietly stagnate in their positions for decades, just because aren't motivated to rise above their position and, quite frankly, they don't want to.



Figure 1: Level 1 Analyst Tenure



The strained relationship between level 1 and level 2 is one of the common motifs in IT support. There are communication issues galore, lack of ownership, missed OLAs, and a simmering animosity that never subsides. So, if this relationship doesn't work, why are we still subjecting ourselves and our customers to it? Is there a better way? Yes, and I've seen it in action.

I met Diane in Venezuela many years ago. She was the director of a huge support center, managing thirty-five managers and over 1,000 agents and technicians. I spent three days with Diane and



her managers and walked away feeling inspired. You see, it was part of Diane's standard practice to swap jobs with each of her managers at least once a year. They, in turn, would take on her job, going to her meetings, making decisions, and walking in her shoes. In addition, the managers rotated positions, supervising other teams throughout the year.

In spite of all this job swapping, there was no jealousy, no fear of "outdoing" someone else. I found that they enjoyed their jobs and each other's company, they trusted each other, and they were far more productive than any other team I had ever met... until I met Danny Richardson, section manager of IT Customer Support at Pantex.



Spliced Support

In the United States, there is one company that is responsible for assembling and disassembling our nuclear arsenal: Pantex. Because of the nature of their business,

Danny Richardson
Section Manager, IT Customer Support
Pantex

you probably want the Pantex IT group to provide the best technical support and customer service, 100 percent of the time, yes? That's what I thought! I have studied Danny's group, interviewed him, and trained his people and it was no surprise that his model of support provides exactly what we've been looking for: sanity, service, and solid cooperation that is both productive and efficient.

My friends and clients know that one of my favorite questions is "What would it be like if?" So I ask you, "What would it be like if we combined three jobs into one?" What if we were able to support the business and our customers by combining the level 1, level 2, and team lead roles? "What?!" you say. Yes, what would it be like if everyone in support had the opportunity, capability, and authority to serve in an "all-in-one" position?



If you will indulge me, I'm going to coin a new phrase: spliced support. Spliced support is what we live with every day: separate jobs, separate functions, separate rules, separate management, and sometimes separate budgets. When Danny's group employed spliced support, they found, as we all do:

- A disconnect between level 1 and level 2 when it came to relaying the proper information
- Frustrating results
- Unnecessary customer visits (level 2)
- Level 1 didn't have the knowledge it needed in order to ask the right questions (when you don't know what to ask, you don't know what to ask!)
- Mean time to resolution (MTTR) was much longer
- Level 2 would have to reinterview the customer, leading to customer frustration ("Why are you asking me again? I already told the other person.")
- Higher costs and lower productivity, resulting in lower effectiveness and efficiency

If you aren't surprised by this, you've probably experienced this at your own site. The truth is, when it comes to serving our customer and the business, there is no difference between level 1 and level 2 support. Even ITIL agrees that customer support is the responsibility of the entire IT organization, not just the service desk. In actuality, the only difference between level 1 and level 2 is in the level of knowledge and skill, the level of communication, and the amount of emotional baggage, all of which have created a cavernous gap between these two levels of support.

Blending the Support Center, Desktop Support, and Team Lead Roles

Danny's IT group threw out spliced support. It wasn't working. I wish I could say that I was the catalyst for the change, but alas, the brain child behind this move was O.J. Blankenship, a manager who has since retired. Danny took O.J.'s idea and made it what

it is today (while dealing with a headcount that was reduced by half). He combined level 1, level 2, and team lead roles, which are performed by each individual on the team. On average, it takes a new employee four to six weeks to be fully functional in this environment. Then jobs are rotated. For instance, Joe will sit on the phone for two days (level 1), then he will go into the field for two days (level 2). Joe will then take on the role of team lead for a couple of days before he heads back to the phones. Each person is capable of performing each role. The less experienced members of the team may not perform the role of team lead, but they understand the functions of the lead and can fill in when needed.

Crosstraining...what a concept! Let's look at the benefits of the "all-in-one" (AIO) role:

1. Everyone's knowledge is robust.
2. We support and meet our SLAs with greater confidence.
3. Greater productivity and collaboration within the department and among the employees.
4. Increased customer confidence.
5. When there are absences of staff, you may be constrained, but you will keep the fluidity of your support.
6. Lower burnout rates.
7. Higher retention rates.
8. Move out the individuals who are not interested in growing (that may be the best reason to try the AIO model!).
9. Greater buy-in from employees who feel trusted and valued.
10. Less negative competition between levels (since there are none!).

As Danny says, "Now is the time to raise the stakes. **We can't hide behind our organizational borders and headsets anymore. Our team treats the customer the same whether they are face to face or on the phone, because the person we speak with on the phone today will be the person we will stand in front of tomorrow.**" Granted, Danny's team provides on-site service at a single location. Yet

Diane's "desk" encompassed all of Venezuela. So how do we do this on a national or international scale? Maybe consolidation, all the rage back in the 1990s, wasn't such a great idea after all. Perhaps we need to rethink how we utilize our regional employees.

Building the Case for the All-in-One Job

The IT industry is very process-oriented, and processes enable a service organization to meet its customers' expectations and needs through the efforts of excited, skillful, and responsible employees. So, how does this AIO model fit in with industry best practices, like ITIL? As it turns out, Pantex has almost fully implemented ITIL, and each member of the team is responsible for incident, problem, and change management. Danny says, "If it is a bad release, each of us has to live with that; if it is a good release, we enjoy the benefits!"

As the manager of an AIO organization, Danny likes to see the relationships his staff have built and the impact that they have on their customers. "It is more visible than the traditional roles. When it goes well, we are brilliant. When it doesn't go well, we immediately see what needs to change and improve. Now I am a manager of people, not processes. I am not battling to get things done. I let my

smart people figure out how to get things done and they train the other staff well, because they are counting on one another."

If you're thinking that this is probably too expensive, Danny and I crunched some numbers. Using average compensation data from the 2010 HDI Practices & Salary Survey, Figure 2 presents two simple scenarios.

Figure 2: Salary Comparison between Spliced Support and AIO Role

Spliced Support	Average Salary	AIO Role	Average Salary
7 x Level 1	\$38,000	8 x AIOs	\$51,000 ¹
<i>Total</i>	<i>\$266,000</i>		
1 x Level 1 Team Lead	\$47,000		
<i>Total</i>	<i>\$47,000</i>		
4 x Level 2	\$48,000		
<i>Total</i>	<i>\$192,000</i>		
1 x Level 2 Team Lead	\$60,000		
<i>Total</i>	<i>\$60,000</i>		
Total staff compensation	\$565,000		\$408,000
<i>Immediate savings</i>		<i>\$157,000</i>	

¹The AIO role's salary is averaged using level 1 and level 2 numbers, with the addition of \$8,000 per year for the team lead function.

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"Don't worry. I think I know how to fix this problem. Do you have a paperclip, a magnet, a can of WD-40 and two grams of uranium?"



What we once needed thirteen people for, we can now do with eight or nine staff members. In Danny's case, he cut his staff in half (thirty-two to sixteen) while continuing to provide outstanding service to his customers and business, as well as engaging and growing employees. And keep in mind, these numbers do not reflect the cost of lost knowledge (associated with low retention and high burnout), reduced productivity, decreased customer satisfaction, and increased training for new hires. Imagine if they did!

We're sold. All we really want is for you to ask, "Is this really working? Is there a way to make it better? Is there a way to keep my best and brightest employees? Is there a way to make our customers see that we provide magical support? Is there a way to improve our productivity and bottom line?" Technical service and support will never die, but it must change and mature. Now is the time!

To contact Danny Richardson, e-mail him at drichard@pantex.com.

Deborah will be presenting this topic in a SPIN webinar on March 15, 2011. To register, visit www.ThinkHDI.com/resources/webinars.

Major Benefits of the All-in-One Role

- No guesswork—you know who your star performers are.
- Increased visibility of customer issues—you know who's doing what and when.
- True one-stop shopping— immediate help that doesn't have to be deferred to the experts because everyone on your team is an expert.
- Symbiotic teamwork that sharpens everyone's skills and dedication.
- Lowers cost—longer retention and reduced burnout means less staff is required.
- Training is the culture and everyone learns.
- Increased customer comfort.

About the Author

Deborah Monroe is the president of Ignite Achievements Int'l and an expert in emotional intelligence. Working largely with help desks, call centers, and technical groups around the world, Deborah concentrates on integrating humans and processes to create a balanced working environment.

Deborah received her MA in organizational behavior from Glendale University. As a speaker, facilitator, and coach, she blends high energy and enthusiasm for change in the workplace with engaging and motivating stories that are down-to-earth and humorous. She can be reached by e-mail at dmonroe@IgniteAchievements.com.




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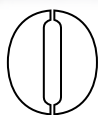




The Obsession with Zero:

Help Desk Statistics, a Delicate Balance

by Kent Blake



One of the greatest inventions since the leaf blower is the help desk ticketing system.

By tracking calls, these systems preserve solutions to previous problems and they document the number of people you helped in a given period. And that's just the beginning. Ticketing systems also offer a wealth of valuable statistics (i.e., metrics). But if that is all they do, then they are, at best, descriptive, not prescriptive. For ticketing systems to be prescriptive—that is, for them to tell us where to focus our efforts—we must first decide what the goal of our efforts should be. If the goal is to help the end user get back up and working in the quickest, most efficient manner possible, then we can more easily determine which metrics matter the most.

The Truth about Metrics

Not all metrics are of equal importance. That is why just because you can measure something, it doesn't mean you should. Don't waste time measuring something that is not a part of the story. You know what the story is: getting the end user back up and running as quickly as possible.

Most service desks already focus on the metrics that tell them something significant about productivity, such as hold times and first call resolution rates, but we must also measure things like network speed, hardware and software utility, technician turnover, etc. Your task is to know what affects your productivity and always be prepared for management to ask you how you can improve productivity.

TMI! Too Much Information

Today's ticketing systems make it easy to generate piles of reports and endless lists of numbers. Without thoughtful interpretation, thoughtless exposure to metrics can result in flawed assumptions and the illusion of understanding. I have a hard time justifying the use of more than twenty-five metrics for three reasons:

- Every metric you measure costs money, even if it is just the labor to track it.
- Eventually, you reach the point of diminishing returns, or “who cares/what real difference does it make.”
- If you are obsessed with random metrics, senior management may start to wonder whether you're actually fixing the company's problems.

Right now, I am looking at a spreadsheet for a company that tracks more than forty metrics. When you're on the spot, explaining the numbers to upper management, you don't want to waste time with a mess of figures, graphs, and charts. You want to focus on the story, or you may find yourself face-to-face with the dreaded “obsession with zero.”

Grabbing the First Thing with a Handle

I recently overheard a high-level manager boasting about the fact that his company of 1,000 employees had almost no open tickets. To be fair, he had probably just been overwhelmed by an IT executive report and grabbed the first thing with a handle: open tickets. The number of open tickets is often assumed to be “the

bottom line.” But it is not the only gauge of end-user satisfaction, and if you focus too much attention on it, you may develop an unhealthy obsession.

As an example, assume that if you’re supporting 1,000 computers, you’ll have at least twenty-five open tickets at all times. You’ll have PC builds, break/fix requests, software installs, and a hundred other problems happening all at once. (I know this is a low number for that volume of hardware, but let’s go with it for illustration purposes.)

When senior managers are drowning in a sea of numbers, they instinctively grab for a number they can understand: zero. The help desk manager must then explain why zero open tickets, for example, is an unrealistic goal. Pressuring technicians to drive open ticket totals down to zero can force even the best technicians to “game” the system. I’ve seen this happen in several companies:

- Instead of opening an incident ticket, some technicians will leave customer issues in their inboxes until they can get around to them. They don’t want unresolved problems on the system radar where everyone can see them and pressure them to close the ticket prematurely.
- Less conscientious technicians will close tickets that are not quite ready to be closed.

When a user’s PC problems are worked “off-screen,” management can’t get an accurate sense of the workload. This has a trickle-down effect. For example, it increases the odds that requests will fall through the cracks when a technician is out sick or on vacation.

Telling a Relevant Story

Instead of focusing exclusively on open tickets, scan your management reports for the four areas below to get a more faithful picture of the state of technical support in your company.

• Closed tickets

A preoccupation with open tickets prevents you from fairly evaluating your technicians. It is frustrating for technicians to be chastised for a handful of open tickets and not be complimented (and compensated) for a high volume of appropriately closed tickets. Do you know which technician solved the most end-user problems last year (i.e., closed the most tickets)? Who was second and third? If you don’t know, chances are you are not rewarding them either.

And be aware that some jobs take more time and produce fewer closed tickets. A person who specializes in PC builds may have fewer closed tickets than a full-time help desk agent, but that doesn’t mean they aren’t working just as hard.

• Ticket aging

The most legitimate concern with open tickets is aging. How long has the open ticket been open? If the ticket owner is sitting on a large number of open tickets and they aren’t really busy, what on earth is going on? The challenge is motivating that person to fix user problems and close those tickets. Of course, the greater the severity of the issue, the more concerned you should be with how long the ticket has been open.

• Root causes and solutions

In many organizations, the help desk manager is probably the best person to ask to perform trend analysis. By looking at the big picture, they will be able to spot trends that occur in statistically significant sample sizes. For example, if 10 percent of all help desk calls are for password resets and you receive 1,500 calls per month, you may want to investigate an automated password reset solution, especially if your help desk is not 24x7. This would allow users who are locked out on the weekend to return to productivity that much quicker.

• “Frequent flyers”

Is there a trend among the most frequent callers that could be fixed with a little scheduled IT training? There are always going to be people who call more than others, and that’s not a problem. The point is not to shame them into not calling, but to help them.

The belief that a low ticket total guarantees great customer support has the distinct disadvantage of being wrong. By placing undue emphasis on closing open tickets, you put unreasonable pressure on your technicians, who might resort to closing tickets prematurely or not opening them at all. The moral of the story? Don’t obsess over zero. Generally speaking, better productivity results from focusing on authentic, realistic metrics and recognizing your technicians for their achievements.



About the Author

Kent Blake has worked for fourteen years in technical support. He enjoys conversations on technical support issues and occasional consulting. Currently, he is the president of Worldwide Audio, specializing in podcasting for organizations throughout the world. He can be reached at kent@wwaudio.net.



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Industry Award Judging Is Underway

Move over, Oscar! HDI's award season is in full swing. For the Analyst of the Year Award, HDI's local chapters have already chosen their winners, who will now move onto regional competition. All seven regional winners will attend the annual conference, along with the Manager of the Year Award finalists and representatives from the Team Excellence Award finalists. And while we are eagerly awaiting the results of the Analyst of the Year regional competitions, we are proud to share with you the names of the nominees for:

The HDI Manager of the Year Award

Andrew Schneider, The MIL Corporation

Brian Frock, Technisource

Carol Sloper, Flatiron Construction Corp

Dan LaFever, Alverno Information Systems

George Reichert, Parker Hannifin Corporation

Jonathan Olson, Prudential Financial, Inc.

Matt Sharpe, DaVita, Inc.

Michael Wilson, BDO

Sherrie Durasoff, TIAA-CREF

The HDI Team Excellence Award

Alverno Information Services

BDO

BJC Healthcare

EzeCastle

Memorial Hermann Healthcare System

NIAID/OCICB

Office of Legislative Council

Orrick, Herrington & Sutcliffe LLP

RCIS

Red Hat

Technisource

Telus

The Ohio State University Medical Center

TransCore

Volkswagen Group of America

The national award winners will be inducted into the HDI Hall of Fame at the 2011 HDI Annual Conference & Expo in Las Vegas, NV (March 29–April 1). Join us as we celebrate the achievements of the individuals and teams who, through excellent performance, are enhancing the image of the IT service and technical support industry.

For more information about the HDI industry award program, visit www.ThinkHDI.com/awards.

Now Available:**2010 HDI Practices & Salary Report**

Get the inside scoop on service and support industry trends and statistics! The 2010 *HDI Practices & Salary Report*, the definitive resource for trending and statistical information for help desk and support center managers, as well as for vendors that serve the support community, presents an overall look at the state of the IT support industry.

Highlights:

- As support centers are being asked to do more with less, the number of incidents continues to increase for most organizations (67%).
- The percent of support centers expecting layoffs, hiring freezes, and salary freezes is down. Over 34 percent are actually anticipating an increase in hiring in their support organizations.
- Training is considered by most respondents to be the most influential factor with regard to customer satisfaction (90%), performance metrics (85%), and successful product implementation (81%).

HDI members, Gold and above, will receive their complimentary copies by mail. Additional copies can be purchased from the eStore (\$148 for members), and members can download the digital edition free of charge at www.ThinkHDI.com/PSR.

Take the HDI Desktop Support Practices & Salary Survey

For many years, the annual HDI Practices & Salary Survey has tracked growth and changes in the IT service and technical support industry. We are pleased to announce that we are expanding our research efforts in this area to include the desktop support community!

The new HDI Desktop Support Practices & Salary Survey is currently collecting data to compile into a ground-breaking report on the desktop support industry. The data gathered from this survey will provide insight into the current processes, technologies, metrics, salaries, and staffing practices related to desktop support. Everyone who completes the survey will receive a complimentary copy of the final report in March.

The survey is targeted towards supervisors, managers and directors. Take the survey now and you will be entered to win an iPad!

To take the survey or forward it to a colleague, visit www.ThinkHDI.com/Desktop.



PHOTO: Bill Vriesema



PHOTO: Bill Vriesema



PHOTO: Bill Vriesema

Wagons West! HDI Higher Education Forum Meets at Brigham Young University

From November 8–11, the HDI Higher Education Forum gathered in Provo, UT, at Brigham Young University. There was no better place to close out a year of Forum meetings than the gorgeous BYU campus at the foot of the Rocky Mountains.

As always, these were three days of intense networking, brainstorming, and learning. Forum members participated in a roundtable discussion on the challenges associated with starting the fall semester, a collaborative peer consulting exercise, and a tour of the BYU support center, led by Forum members Christine Oakes and Gene Ushinsky. In addition, Forum members enjoyed guest presentations and lectures on a wide variety of topics, including BYU's process improvement and improved escalation program, cloud computing, and the "Speed of Trust."

Work hard, play hard: In the evenings, the Forum hit the town, sampling the cuisine at the Chef's Table in Provo and quaffing some cheekily named beers at the Wasatch Brew Pub in Park City (Polygamy Porter, anyone? Or maybe a glass of 1st Amendment Lager?).

PHOTO: Bill Vriesema

The first HDI Higher Education Forum meeting of 2011 will be held in Las Vegas. If you're interested in joining the Forum, or maybe just giving it a test drive, contact the Customer Care Center at support@ThinkHDI.com or by calling 800.248.5667.

HDI Announces New Technical Support Forum

External Facing Customer Support Centers Gain Powerful Resource



With the first meeting scheduled for October 2011, this HDI membership program will allow a strategic group of senior-level support leaders to network, exchange ideas, discuss issues and challenges, and share benchmarking ideas specific to their area of external facing customer support. Based upon the success of HDI's other Forums and in response to member demand, this new Forum will focus on methods for improving customer service while optimizing people, process, and technology.

Learn more at www.ThinkHDI.com/Forums.



Intel Hosts the HDI Executive Forum in Costa Rica

Lively discussion with industry peers, candid idea-sharing in the spirit of helping others address similar challenges, international camaraderie, and a white-water rafting adventure combined to create a three-day HDI Executive Forum experience that reinforced how global our industry has become, and just how much common ground we share as we seek to improve our service organizations. Sixteen forum members convened in Belén, Costa Rica, a buzzing industrial zone just outside the country's capital, San Jose. About 15,000 Costa Ricans work in some aspect of IT services, technical support, and customer service in Costa Rica's central region.

Intel invited Forum members for an exclusive, full day of learning, introducing the participants to Costa Rican culture and leading a tour of the manufacturing facility, which produces Costa Rica's number one export—microchips—as well as sharing the IT service practices that help Intel provide world-class support to its 90,000 employees worldwide. Members enjoyed a tour of Intel's innovation center, which showcases Intel's computing power, the advanced 500-server data center, and its IT service and support facilities.

Our hosts, Javier Murillo, office computing service desk manager, and Chris Sellers, director of IT service operations, manage a 6,000-member team of internal technical support professionals across five service desks operating in Belén and Panang, VietNam. Among other activities, they demonstrated how Intel uses chat services to address nearly 35 percent of its incidents each year.

On the second day of the meeting, Jack Wilson, principal consultant with Virtual Savant, facilitated a debate on the merits and realities of application and desktop virtualization, drawing from his work at Amerisure Insurance, which achieved 100 percent application virtualization over a four-year period. Cinda Daly, HDI's director of business content, wrapped up the meeting with an interactive discussion of HDI and Global Knowledge's joint research report on the state of ITIL implementation.

The Executive Forum will convene for its spring meeting at the HDI Annual Conference & Expo in Las Vegas, March 29–April 1.

New Release:

Knowledge-Centered Support Fundamentals

In December, HDI launched a new online course: Knowledge-Centered Support Fundamentals. This course is designed to provide support center supervisors, managers, and directors with an awareness of knowledge management best practices. In addition, it introduces participants to the fundamental concepts of the Knowledge-Centered Support (KCS) methodology, which can be used to build internal support for knowledge management initiatives.

The KCS Fundamentals course is being offered in the classroom, online, and on site. To learn more, visit www.ThinkHDI.com/KCSF.

HDI Certifies First Desktop Support Managers

Congratulations to Erik Valentine and Ken Sizemore, HDI's first certified Desktop Support Managers!

The HDI Desktop Support Manager certification verifies that desktop support managers possess the knowledge of best and common practices necessary to successfully manage the operational and tactical components of a support organization while strategically aligning it with the needs of the business. The program aims to meet the unique needs of those who manage desktop support functions and is recommended for both new and experienced desktop support managers.

"The desktop support manager plays a critical role in every IT service organization, yet there is a lack of documented best practices and training for these professionals to leverage," says Rick Joslin, HDI's executive director of certification and training. "Desktop support managers need to invest in their own professional development and obtain certifications as recognition of their skills and knowledge in the industry."

HDI began offering the three-day course in November, at locations across the United States. For more information, visit www.ThinkHDI.com/DSM.

HDI Joins the IT Certification Council

The IT Certification Council (ITCC), a group of industry leaders that are committed to growing professional certifications, recognizes that the global technology industry requires a qualified workforce. Led by Citrix Systems, Microsoft, Novell, and HP, this organization of IT certification providers is working together to promote the IT professional and improve and guide the IT certification industry. Rick Joslin, HDI's executive director of training and certification, represented HDI at the ITCC's December meeting in Chicago, where the council defined its 2011 strategy.

The ITCC is a resource for employers, government officials, academics, and individuals seeking information about the many benefits of IT certification. It establishes industry best practices promotes the value of certification and exam security, and raises other certification issues as identified by the council. For more information, visit www.itcertcouncil.org.

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HDI Certification and Training COURSE SCHEDULE

Schedule is subject to change. Check www.ThinkHDI.com/Training2011 for updates.

Certification Courses	Public Classroom Length	Public Classroom (Member Price/Price)	Online Classroom Length	Online (Member Price/ Price)	March	April	May
HDI Customer Service Representative	1 day	\$795 / \$895	6 hours	\$345 / \$395	Delivered online & on site. Call 800.248.5667 or visit www.ThinkHDI.com/CSR for details.		
HDI Support Center Analyst	2 days	\$1,295 / \$1,395	10-12 hours	\$545 / \$595	7-8 Washington, DC 14-15 Boston 14-15 Atlanta 21-22 Colorado Springs 28-29 Las Vegas	4-5 Baltimore 11-12 New York City 11-12 San Diego 25-26 San Francisco	2-3 Dallas 9-10 Washington, D.C. 16-17 Cleveland 16-17 Los Angeles
HDI Desktop Support Technician	2 days	\$1,295 / \$1,395	10-12 hours	\$545 / \$595	7-8 Washington, DC 14-15 Los Angeles 28-29 Las Vegas	—	—
HDI Support Center Team Lead	2 days	\$1,495 / \$1,595	16-20 hours	\$645 / \$695	7-8 Washington, DC 28-29 Las Vegas	4-5 Denver 18-19 Atlanta 25-26 Boston	2-3 Dallas 16-17 Toronto 25-26 Irvine
HDI Support Center Manager	3 days	\$1,795 / \$1,895	—	—	2-4 New York City 2-4 Philadelphia 9-11 Washington, DC 16-18 Boston 16-18 Atlanta 23-25 Columbus, OH 27-29 Las Vegas	6-8 Baltimore 13-15 Toronto 13-15 New York City 13-15 San Diego 27-29 San Francisco	4-6 Dallas 11-13 Washington, D.C. 18-20 Cleveland 18-20 Los Angeles
HDI Desktop Support Manager	3 days	\$1,795 / \$1,895	—	—	2-4 Atlanta 9-11 Washington, DC 16-18 New York City 16-18 Los Angeles 23-25 Dallas 27-29 Las Vegas	13-15 Irvine	4-6 Dallas 11-13 Los Angeles 25-27 Atlanta
HDI Support Center Director	3 days	\$2,795 / \$2,895	—	—	9-11 Washington, DC 27-29 Las Vegas	4-6 Dallas	
Knowledge Management Foundations: KCS Principles	3 days	\$1,495 / \$1,595	—	—	9-11 Washington, DC 27-29 Las Vegas	27-29 Boston	4-6 Dallas
ITIL v3 Foundation	3 days	\$1,395 / \$1,495	14-18 hours	\$325 / \$350	—	18-20 Chicago	25-27 Washington, DC
Service Management Courses		Virtual Classroom Length	Virtual (Member Price/Price)		March	April	May
Advanced Proactive Problem Management		6 hours	\$545 / \$595		15-17 Virtual Classroom	—	10-12 Virtual Classroom
Building Your ITIL Adoption Roadmap		6 hours	\$545 / \$595		—	19-21	
Building Your Service Catalog		6 hours	\$545 / \$595		22-24 Virtual Classroom	—	17-19 Virtual Classroom
Change Management		6 hours	\$545 / \$595		—	—	—
Coaching Strategies for Extraordinary Performance		4 hours	\$375 / \$425		—	26-27 Virtual Classroom	—
COBIT Principles for IT Governance		6 hours	\$545 / \$595		—	—	—
Configuration Management		6 hours	\$545 / \$595		—	—	—
Incident Management		6 hours	\$545 / \$595		—	19-21 Virtual Classroom	—
ITIL v3 Lite & ITIL v2 Lite		6 hours	\$545 / \$595		Delivered online. Call 800.248.5667 or visit www.ThinkHDI.com/ITILV3LITE for details.		
Knowledge-Centered Support Fundamentals		6 hours	\$545 / \$595		—	12-14 Virtual Classroom	—
Mapping Support Processes		6 hours	\$545 / \$595		—	—	9-23 Virtual Classroom
Problem Management		6 hours	\$545 / \$595		—	—	24-26 Virtual Classroom
Service Level Management		6 hours	\$545 / \$595		—	—	24-26 Virtual Classroom
Service Management Essentials		6 hours	\$545 / \$595		7-8 Washington, DC 28-29 Las Vegas	6-7 Denver	2-3 Dallas
Support Center Metrics and Measurements		6 hours	\$545 / \$595		22-24 Virtual Classroom	—	17-19 Virtual Classroom

Three Ways to Register:

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Most software companies expect you to invest months – or years – to implement IT service management. Plus, they bring in teams of expensive consultants who drain your budget and slow down implementation. Not Numara® Software. Our Web-based Numara® FootPrints® 10 gives you practical, flexible IT service management for the real world.

Up and Running in Weeks — No Programming. No Hassles.

Only Numara FootPrints 10 implements quickly with robust features like these:

Expanded Support for ITIL® V3

Whether you're just beginning to formalize your IT processes or you're fully embracing ITIL V3, Numara FootPrints 10 is your real world solution.



Integrated Service Catalog

Quickly create an easy-to-use menu of services for your internal and external customers.

Extensive Knowledge Management

Share vital knowledge between different business areas and boost service desk efficiency.

Proactive Service Management

Keeps you up and running and lets you track recurring service requests.

Comprehensive Change Management

Control and audit infrastructure changes. Tightly integrated with CMDB.

Now With Desktop Management Integration*

- Remote control devices
- Deploy software
- Distribute patches
- View and audit inventory

All from the service desk console.

* Powered by Numara Asset Management Platform

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Real Value. Real Flexibility. Real Results.

Visit www.numarasoftware.com/footprints today to download a **FREE 30-day trial** or view a Webinar.

Or call **1-800-420-1904** to learn more.