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Transforming the "Helpless Desk" Into a Service Desk

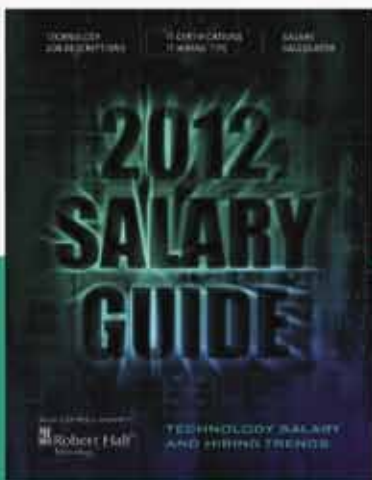
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HDI SupportWorld™

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Presented by Robert Jew

December 13

Trendspotting: A Report from HDI Research
Presented by Jenny Rains, Roy Atkinson, and Cinda Daly

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Dear *SupportWorld* Readers,

The IT world as we know it today is not the IT world we knew ten months ago. If you aren't changing, adapting, growing, and improving, then you'll be closing your doors and looking for a different line of work! When I see and hear what our members are dealing with today, compared to a year ago, many things are the same: doing more with less, password resets, knowledge management, employee motivation, ITIL processes, etc. But I'm also hearing about the cloud, social media, the environment, making an impact using a multigenerational workforce...the list goes on and on.

These trends aren't just affecting the practitioner side of membership, either. I'm also hearing about and seeing changes in the software, hardware, and all other aspects of the technical service and support industry, from adapting to social media challenges and protecting brand awareness to keeping an edge in an ever-changing economic climate.

Our community believes not only in the strength of processes and technology, but also that the strength of our industry lies in the strength of its people and the knowledge they bring. The IT industry is changing...no doubt! But the belief in people continues to be the basis of who we are and what we bring to our content, our events, our training, and our membership. Making people stronger, smarter, and more connected will make it easier to weather the changes to come in 2012.

In this issue, we take a look back at some of the changes we saw in 2011, from the release of KCS v5 and ITIL 2011 to the evolution of managed services and the emergence of the ITCC TechCert Registry, which will be cracking down on certification fraud in the years to come. We also present an overview of the *2011 Support Center Practices & Salary Report*, as well as an article highlighting a strategic approach to transforming a "helpless" desk into an efficient, effective service desk. But the centerpiece of this issue is the state of the industry article, "Technical Support in a Virtual World." Cinda Daly, HDI's director of business content, gathered a panel of support executives together for a series of meetings in August and September. The resulting article, which focuses on workplace virtualization, cost containment, financial accountability, ROI, customer expectations, and changing workforce dynamics, looks down the road to 2012 and beyond. Be sure to check out the podcast, too!

From all of us here at HDI, we wish you a happy holiday season and a productive 2012. As always, we want to hear your opinions, stories, and feedback.

Sincerely,



Sophie Klossner
Director of Membership and Local Chapters

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

Letters to the editor should be sent to editor@ThinkHDI.com or by mail to: 121 South Tejon Street, Suite 1100 • Colorado Springs, CO • 80903

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Takin' It to the Streets: Highlights from the 2011 Support Center Practices & Salary Report

by Jenny Rains

Everything we do makes a difference. Any decision or modification we make leaves its mark on the bigger picture. No matter what the industry, IT service and technical support is behind the scenes, performing a role that serves a larger purpose. The goal of the HDI Practices & Salary Reports is to provide support center and desktop support leaders with a view of the industry as a whole, and to help them make a positive impact on their industries. This article highlights some of the findings from the recently released *2011 Support Center Practices & Salary Report*.

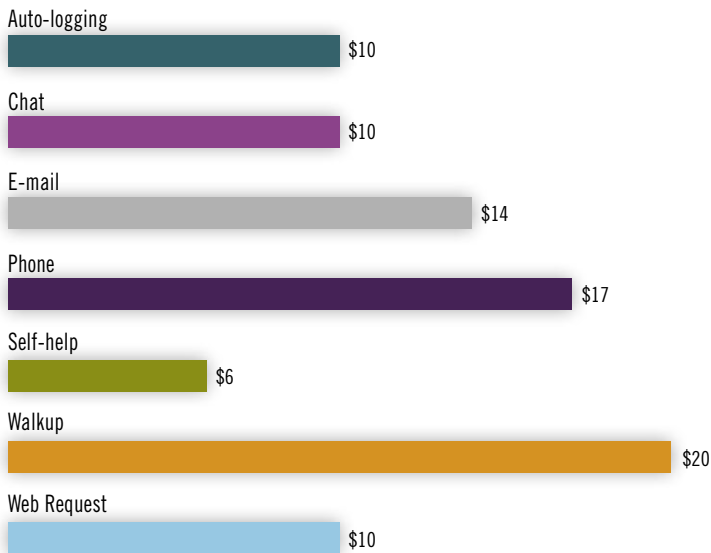
Incident Management

New customer equipment, devices, and applications are responsible for the continued growth in ticket volume seen by most organizations (68%). Only a small percent of support organizations (12%) are seeing a decrease in ticket volume, mostly attributed to changes in infrastructure, followed by knowledge management and customer competency.

An increase in the use of less-expensive channels, such as web requests and auto-logging, for ticket submission indicates that organizations are adopting channels other than phone and e-mail for ticket submission. However, over half (54%) of support centers

allow customers to submit tickets through walk-ups, the most expensive support channel (median = \$20); this is even more common in smaller organizations (65%), and is extremely common in the education industry (higher education, 80%; other education [e.g., K–12], 75%).

Median fully-burdened cost for the support center, per incident resolved by each channel (US data only):



Given the increase in ticket volume reported by most survey respondents, it is no surprise that these support organizations also reported an increase, up from last year, in the amount of time spent on customer tickets. Level 1 support spends an average of 78 percent of the work day on customer tickets; level 2 support and desktop support technicians spend an average of about half a day on customer tickets. In smaller support centers, level 1 support spends more time on other activities (30%); in larger centers, however, level 1 support is even more dedicated to customer support (82% of a work day) than the average.

Technology

The technology for providing support to customers is rapidly evolving, but, more importantly, support centers are increasingly adopting new technologies and practices to keep up with consumer expectations. This sense of urgency is apparent in the survey results. Fifty-two percent of support organizations are planning to add, update, or replace self-help. The use of self-help technologies is even more common in large support centers (10,000+ customers), with 91 percent using or planning to add some sort of self-help technology for their customers.

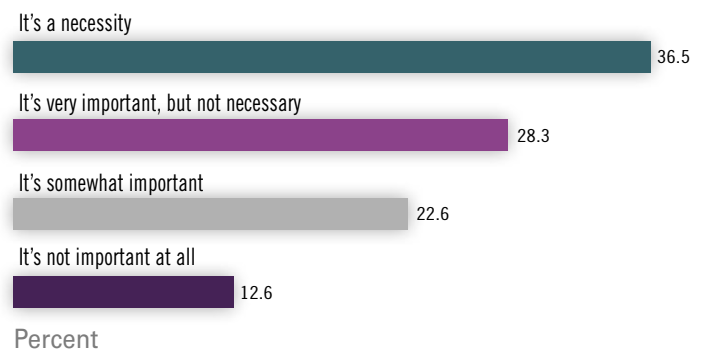
In addition to self-help, support centers are improving the support they provide by enhancing their technology portfolios. Fifty percent of support centers are planning to add or upgrade their current knowledge management tools, and 31 percent are planning to update or replace their current incident management tools.

While there was only a small increase from 2010 in tickets received through chat, it continues to be adopted by more and more support centers; 40 percent are currently using chat, compared to 30 percent last year, and 21 percent are planning to add it. Similarly, few support centers are receiving tickets through social media channels, though they are being used to provide support in other ways—such as providing information through blogs, discussion boards, Facebook, or Twitter—by almost half of the support centers who responded. In general, larger support centers are consistently adopting technologies at a faster pace than their smaller counterparts.

Also, larger organizations and internal support centers are more likely to align their tool selections with ITIL processes. In the industry as a whole, 37 percent report that ITIL alignment is a necessity when selecting technologies and an additional 28 percent believe it is very important, but not necessary. Overall, the survey results indicate that support centers are shopping for technology again, and, more specifically, they are shopping for technologies that align with ITIL processes.



The importance of ITIL alignment in choosing support tools:



Processes, Procedures, and Strategies

For the first time in the history of the HDI Practices & Salary Reports, the term *service desk* is being used to describe support centers in the industry more than the term *help desk*. This shift is an indicator of ITIL's influence on the industry.

In 2010, it appeared that ITILs popularity might be fading, but the 2011 survey results reveal this is not the case, with 68 percent of support centers currently using or planning to implement ITIL processes. The most-adopted ITIL processes are incident management (69%), problem management (46%), and change management (56%). HDI Support Center Certification, Knowledge-Centered Support, and Six Sigma were also strong influences on support centers this year.

Using service level agreements (SLA), operational level agreements (OLA), and underpinning contracts to manage customer expectations continues to be common practice in the industry; three-quarters of support centers maintain at least one type of these agreements, which is consistent with previous years. One-third of support centers are meeting their SLA/OLA targets for over 90 percent of tickets.

About one-third of support centers have staff outsourced either in-house, in-country, near-shore, or off-shore, with retail (63%) and financial services (46%) well above that. After-hours services and hardware support/repair are the most commonly outsourced functions. Cost is the number-one factor (62%) influencing support center outsourcing decisions. When asked why support centers are not outsourcing more, control of service (49%), service quality (49%), and customer acceptance (42%) were the most frequent responses.

Performance Metrics

Three-quarters of support centers are currently reporting their performance metrics to stakeholders, and an additional 16 percent are producing performance metrics, but not reporting them. Performance metrics reporting is an even more common practice among outsourced services providers (90%), the computer industry (87%), and large (10,000+ customers) support centers (89%).

This year's results reveal that the ever-popular first call resolution (FCR) might be losing its status in the IT support industry. In 2010, 16 percent of support centers were not measuring first call resolution; this year, 24 percent report that they are not measuring this performance metric. Retail/food and beverage and manufacturing are the two highest-performing industries with regard to this metric, with an FCR of over 75 percent. FCR targets are up from last year, which has resulted in less than half of support centers meeting their targets.

First call resolution rate, based on the definition of first call resolution:

	Number of responses	First call resolution rate	Target first call resolution rate	Percent who make target
The ticket is resolved by the person who receives the call	229	68%	73%	42%
The ticket is resolved without hierarchical escalation (transferring at the same level is still first call)	144	67%	73%	45%
The ticket is resolved by any level as long as it is resolved on the initial call	80	69%	75%	42%
The ticket is closed within X minutes of being opened	36	66%	72%	39%

Sixty-one percent of support centers are achieving their average speed to answer targets for the phone. In contrast, one-quarter of support centers have a target phone abandonment rate of less than one percent, an ambitious goal that has contributed to a decline in the number of support centers achieving their targets; this year, for example, 44 percent of support centers failed to achieve their phone abandonment goals.

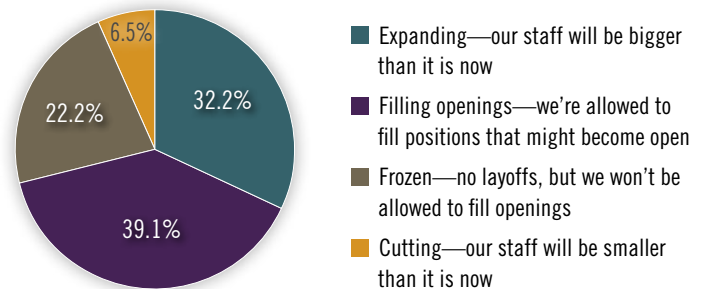
The median time for a support center to respond to a customer e-mail is one to four hours, which is also the most common target for this metric. Eighty-two percent of support centers are meeting their goals for ticket-response time. The survey results reveal that support centers most commonly resolve tickets in two e-mail exchanges between the analyst and the customer, and 21–30 percent of tickets that begin electronically are converted to telephone support before being resolved.

While most performance metrics can be related to customer satisfaction, most support centers (83%) measure customer satisfaction independently. Most support centers believe their customers are happy with the service being provided; 51 percent report that their customers are, on average, satisfied, and an additional 44 percent report that their customers are very satisfied.

Support Center Staff: Training, Certification, and Satisfaction

No matter how sophisticated technologies become, the support center will remain staffed, whether physically or remotely. In fact, 32 percent of support centers will be increasing the size of their support staffs in the next twelve months, and 39 percent are filling open positions.

Staffing expectations over the next twelve months:



Percent of support centers

For those positions that are being filled, these new employees may not be physically located at their customers' sites. Forty percent of support centers have at least some staff working virtually and an additional 10 percent are planning to implement this practice in the next twelve months. Support centers in education, government, and healthcare are the exception to this trend.

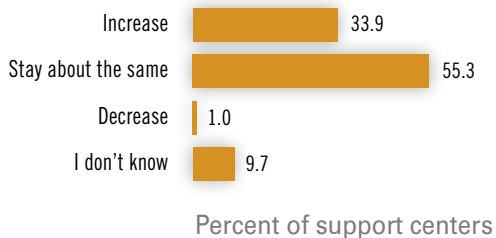
The primary training focus for new frontline hires is customer service skills (25%), followed closely by training on technologies used by customers (24%). On average, most support centers (56%) find that new frontline hires require more than a month in their position before they can work efficiently on their own.

Thirteen percent of support centers require their staff to hold certifications. Government support centers are the biggest supporters of certification, with 23 percent requiring staff to hold formal certifications. In terms of specific certifications, Microsoft is considered to be the most important type of certification, followed by HDI and ITIL.

The 2011 Support Center Salary Report

As economies fluctuate, so, too, do support center compensation practices. This year's salary survey results indicate a slight positive shift in salary practices. Thirty-four percent of support centers anticipate increasing salaries in the next twelve months; only one percent are planning a decrease, and 55 percent expect salaries to remain the same.

What are support centers' salary compensation plans for the next twelve months?



The number-one factor that determines salary increases for call screener/dispatch and customer service representatives is customer service skills. They drop to the number-two spot, after quality of work, for levels 1 and 2 and desktop support technicians. For level 3, customer service skills make the top-five list, but are beaten out by quality of work, increased job responsibilities, technical knowledge, and technical certifications. For team leads and above, management and leadership skills are the top factors influencing salaries.

In 2010, HDI began reporting average salary (US data) for each position by support center size (based on number of customers supported). In both 2010 and 2011, the results revealed that smaller support centers (less than 2,000 customers) pay more at each staff level, with the exception of the manager and director levels. Consistent with previous years, support staffs located in the western region of the United States are typically paid more than those in the central and eastern regions.

About the Data

The information in the 2011 HDI Support Center Practices & Salary Report is based on 780 surveys collected from support centers between April and July 2011. The United States makes up the majority of responses, with 85 percent (660); Canada, 8 percent (60); Australia, 3 percent (25); and a small percent from other countries, like India (8) and Poland (3). The 2011 HDI Support Center Practices & Salary Report comprises current practices and salaries from support centers of all sizes in over thirty vertical industries, and from organizations that provide internal, external, and blended support ranging from on-site only to global.

The 2011 HDI Support Center Practices & Salary Report gives managers and directors the information they need to validate existing practices, discover new ideas for improving methods and procedures in their support centers, and trigger discussions within their organizations and with their peers. Visit www.ThinkHDI.com/IndustryReports to download a copy of the full report.



About the Author

Jenny Rains has worked with HDI in a research/analysis capacity since 2003. Before coming to HDI, Jenny was the research/data analyst for one of the largest school districts in Colorado. Her areas of expertise include survey development, research design, data analysis, program evaluation, and project management.

Transforming the “Helpless Desk” Into a Service Desk

By Lee Weekley



How many times have you called a help desk and were left feeling unsatisfied or frustrated? Sometimes the very act of calling the help desk leaves you more frustrated than the actual problem you called the help desk for in the first place. This frustration and lack of service are the hallmarks of the so-called “helpless desk.” The typical helpless desk is slow to respond, poorly structured, lacks real problem-solving abilities and knowledge, and makes no apparent provisions for standard service levels or service quality. The good news is, all is not lost. The days of expensive, slow-moving, low-quality help desks are largely in the past. The helpless desk can be rehabilitated!

There are many things that might prompt you to transform your help desk: clients may be dissatisfied, IT may be pressuring the desk to be more proactive or involved, morale may be low, or there may be a lack of skills on the desk. All of these are good reasons. Transformation will increase customer satisfaction, lower costs, advance the standardization of service levels and service quality, and greatly improve employee satisfaction. The question is, how do you know if you need to transform your help desk? That's easy:

If your help desk displays any of the following symptoms, then transformation is the way to go.

- Is your help desk slow to respond, either to calls in the queue or to e-mails?
- Does the help desk always seem to be in a reactive, fire-fighting mode?
- Is the help desk unable to anticipate issues?
- Is your help desk's call volume out of control?
- Are resolutions and troubleshooting inconsistent?
- Are customers given different answers to the same questions?
- Do you find that employee and customer satisfaction rates are low?
- Are help desk employees not pulling their weight equally?
- Do you lack reporting abilities?
- Do your reports provide inconsistent measurement and trending?
- Do you notice a lack of continual improvement?
- Is customer satisfaction just a goal, not a fact?

If you answered yes to any of these questions, then your desk is ripe for a makeover. The formula for a successful service desk involves balancing people, processes, and technology. The right balance can greatly improve help desk and support operations by reducing incident-handling costs, improving agent workflow, enabling shared knowledge, and fostering collaboration. By following the three phases of transformation described in this article, you will achieve this goal.

Review and Analyze			
Perform detailed agent-skills gap analysis	Perform service desk maturity assessment	Review existing documentation	Validate staffing models and schedules
Plan and Create			
Develop action plan for improvement	Develop scripts, procedures, and R&Rs	Document schedules/incentive plans	Develop skills gap training
Institute and Support			
Train members/leads	Begin reporting (baseline and ongoing)	Review capabilities for call flow/IVR	Continue documentation of KB/procedures

Review and Analysis

The review phase is primarily concerned with figuring out what you have to work with. As with any project, you must understand where you are today before you can determine where you want to be tomorrow and how you will get there. In this phase, you will assess the help desk's tier 1 agents and examine its processes, procedures, policies, and other documentation. To assess the agents' skills, take advantage of assessment tools that evaluate listening, verbal, telephone, questioning, and problem-solving skills. You also need to determine whether individual agents are logical thinkers, team players, effective communicators, and cool under pressure.

In addition, you will need to assess the help desk's staffing model, utilization rate, schedules, resource management process, leadership, mission and vision, process management, and customer, operational, and business results. Some of the areas to pay close attention to in this phase are business alignment and integration, alignment of the help desk within IT, resource optimization, teamwork, marketing, and the distribution of information. You will also want to examine any of the training plans you have in place, along with coaching and career development processes. Ask yourself, do we have a rewards and incentive program for our help desk? Do we have the right tools and tool configurations? Do we have service levels and are we meeting them? How can we do better?

Review your call scripts and knowledge base to verify that they are effective and up to date. Additionally, look at your communication plans. Is there adequate communication between the help desk and other IT departments and customers? Take a look at the reports

you're currently running. Are you reporting for the sake of running reports, or do you produce meaningful reports that are used to identify trends and areas of improvements and then used to plan for service improvement? Based on this review, you will be able to develop an action plan for your help desk's transformation.

Plan and Execute

In this phase, we will design the activities and documentation that will be implemented in the next phase. As part of the planning and execution process, you will be working off of the action plan you created in the previous phase. By this point, you should have drafted your new process documents, policy documents, and standard operating procedures (in ISO 9001:2008 format), as well as a full communication plan. This plan should cover the operational aspects of the help desk, including notifications and escalations, as well as help desk marketing tactics. It should also address communications between the help desk and the customer, and the help desk and the rest of IT.

The next key step is to start designing individual and group training programs. Based on the skills gap analysis that was completed in the previous phase, create an individualized training program for each agent. In addition, select, design, or procure group training for the entire staff (e.g., ITIL v3 Foundation, customer service skills, etc.). Be sure to include specialized training for the leads and supervisors that covers coaching, leadership, and management skills. Next, create a RACI matrix for each process—incident, problem, request fulfillment, access management, etc.—detailing roles and responsibilities. Make sure each position has an accurate and detailed job description.



Transforming the “Helpless Desk” Into a Service Desk



Create a robust rewards and incentives program, complete with service excellence awards. You should also draft a new help desk operations manual that provides an overview of the help desk's operations and training procedures, including roles and responsibilities for the rest of the organization (e.g., system owners, support owners, business leaders, etc.). This will help new employees learn about the help desk operation.

Finally, create new reports based on the previously assessed service level agreements and operational level agreements. Make sure those reports measure group and individual performance, as well as trends.

Institute and Support

This is where we put it all together. We implement everything that was designed or sourced in the planning phase. Now is the time to start your training programs and boot camps. Stage role-playing exercises where agents can practice their new skills with each other and their managers. Managers should also

implement one-on-one training and coaching sessions with the agents, and create new call flows based on their agents' skills.

Another important factor here is being a hands-on manager, interacting with the help desk, your agents, and your customers. Don't try to manage through e-mail or from your chair. Get up and get involved. Meet with your agents and ensure that they understand the whats and whys of the transformation (what is happening and why). Make sure they know exactly what is expected of them. Be firm, but fair. Always praise in public and critique in private. They need to understand that “this ain't your mama's help desk!” This is serious business and they have to know you mean it; they have to be invested in its success. If they aren't, help them move on. For those who see the transformation through, their jobs will become easier and more fulfilling.

Begin measuring and reporting and reviewing these reports with each agent. Publish the reports and encourage friendly competition between the agents. Finally, now is the time to execute your communications plan, implement your knowledge management program, begin building your knowledge base, and start performing trend analysis and problem management.

The New Service Desk

When the transformation is complete, you will have a new service desk. Customers will be impressed by the consistent and accurate support provided by highly trained and confident agents who display empathy and practice great customer service. In this new environment of total contact ownership, you will notice that the agents think of the people they support as customers, not just users. They will answer the phone with a smile and solve problems efficiently and effectively. No longer a helpless desk, your agents will be proud to work at the new service desk.

The HDI Capital Area local chapter conducts workshops on this subject. For more information, contact the chapter at president@HDICapitalArea.com.



About the Author

Lee Weekley has been in the IT industry for over eighteen years. He has held several distinguished appointments on the governor's Homeland Security Task Force, the Military Affairs Advisory Committee, and the National Small Business Committee, among others. He is also a member of the National Defense Industry Association and president of the HDI Capital Area local chapter. Lee holds several

ITIL certifications, and is a certified HDI Support Center Director.



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Dear Dr. Jim

Our IT organization is interested in being more proactive about incident management. Most of the time, we are just reacting to incidents when users contact the service desk about slow performance or unavailable services. How can we be less reactive and more proactive? Is there a better way to start resolving incidents before users start calling the service desk, or is that not incident management, but something else entirely?

—Sizzling in Scottsdale

Dear Sizzling,

The short answer is, yes, you can be more proactive about starting the incident resolution process without waiting for a user to call first. But you must know about the incident before the user knows. And, yes, this is something else entirely. It's called *event management*.

Let's begin at the beginning. First, we need to expand the definition of an *incident* to accommodate your situation. Generally, an incident is defined as "an interruption to a service or a reduction in the quality of a service." If we expand this a little, we can add "or any event that *could* disrupt a service." This

definition and the terms and definitions that follow are courtesy of ITIL (the Information Technology Infrastructure Library), which I frequently write about.

Next, let's add event management to the mix. An *event* can be defined as "any change of state [that] is significant for the management of a service or configuration item (CI)." Event management is supposed to detect events, make sense of the events, and determine if any control action is required. By definition, an incident is a type of event, because incidents are a change of state that is significant in the support environment. Event management should be able to detect some types of incidents before users are even aware of them. To do this, your event management process must be automated to some degree. And you'll need to blend these two processes (incident and event management) together. Here's how you might be able to blend incident and event management so you can resolve some of your incidents more proactively.

Most of the CIs you should be tracking are designed to transmit information about themselves, which can be detected by the appropriate monitoring and tracking tools. If the information transmitted by the CI can be detected by an agent installed and running on the same system, then the agent can be programmed to determine the significance of the event to decide whether the event is just informational, whether it's a warning that a threshold is being approached, or whether the event is exceptional (like an incident) and requires further action or intervention. This decision is typically made by a "correlation engine," which determines the level of significance of the event and what remedial action might be necessary.

The same monitoring and tracking tools can also be used to transmit automated alerts to the correct subject-matter expert or department whenever human intervention is necessary, using your incident management or any other process. This often enables you to alleviate a situation before the user community is aware of the issue. This is the best kind of incident management: —resolving incidents before they negatively impact users and doing it seamlessly between event management and incident management.

Another critical role can be played by IT personnel who are doing what is typically known as *console management*. This is performed the operations management, or IT operations control, team, which is responsible for executing the organization's day-to-day operational activities. The operations management team is also commonly involved in the management and maintenance of the IT infrastructure, making sure you are delivering services to the business at the levels that were agreed upon in your service level agreements.

Console management is usually overseen by the Network Operations Center (NOC), or Operations Bridge, which is responsible for monitoring operational activities and events reported by your organization's monitoring and tracking tools and event management process. These groups are, in effect, the front line of defense for incident management as well.

Another way to provide early detection and resolution of incidents is by integrating your event management monitoring and tracking tools with the software you are using for incident management. That way, when an event that would be classified as an incident is detected by event management, the tool can automatically open an incident record in the incident management tool and take appropriate action to resolve the incident (perhaps even by self-healing technology, resolving and closing the incident without any human intervention at all).

These techniques can be a real win-win situation for both you and the business you support. Anytime you can discover incidents earlier and resolve them faster, you will reduce the impact of downtime, disruption, lost productivity, and lost revenue.

As you can see, there are steps you can take to improve your incident management processes and become more proactive by integrating them with your event management tools and processes. If you are missing some of the tools or technology I have described, contact your software vendors and ask them if they have any products that will facilitate these processes. I'm sure you will find many that are more than willing to help you down this road.

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About the Author

Jim McKennan, aka Dr. Jim the Service Doctor, is often recognized for his highly developed customer service skills, as well as being an adept call center manager, speaker, and award-winning sales and IT professional. He is a senior consultant with Pink Elephant. Jim is 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 the HDI Support Center Certification Standards Committee. Jim holds a BA in psychology from California State University.

To submit a Service Doctor question for *SupportWorld*, send an e-mail to j.mckennan@pinkelephant.com or drjimtheservicedoctor@yahoo.com.

Jim also posts his prescriptions on his service desk-oriented blog, Dr. Jim's Blog: blogs.pinkelephant.com/drjim.



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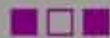
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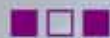
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TECHNICAL SUPPORT IN A VIRTUAL WORLD

by Cinda Daly

Panelists



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The proliferation of mobile devices, increasing social and technical sophistication of the twenty-first century college graduates entering the workforce, and anytime/anywhere demand for access have gained stronger footholds and show no signs of slowing. At the same time, the economic climate continues to be mercurial. However, after years of restricted spending, capital IT projects are beginning to resurface as companies recognize that failure to bring technological innovation back to the organization could spell their ultimate demise. “Every organization’s goal is to grow—everyone wants to be optimistic and build a business plan based on growth,” concludes John Reed, Robert Half Technology’s executive director. “Could things change? Absolutely. But until they do, businesses are staying the course.”

On the technical support side of the house, this means continuing to seek ways to get costs out of the support model, become more effective, and rely more heavily on alternate channels of support to meet the growing demand. For more than twelve years, the participants in the annual HDI Support Center Practices & Salary Survey have reported that their ticket volumes are increasing, pointing to new customer equipment, devices, and applications as the primary drivers.

These pressures are the undercurrent to some of the top trends in the industry today, from greater financial accountability to workplace virtualization, technological diversity, and social media to the new face of technical support. What seems certain is that traditional technical support models are going to change, employee skills required to perform will change, and how people get their work done will change. The industry leaders featured in this article convened on September 9, 2011, to discuss the implications of these key trends, strategies to embrace the realities with confidence, and scope out the future.



Visit www.HDIConnect.com to listen to the panelists discuss “Technical Support in a Virtual World” and hear their views on the future of technical support.



WORKPLACE VIRTUALIZATION

Workplace virtualization encompasses three interrelated trends: consumerization and the proliferation of mobile devices, virtualization, and cloud computing.

Consumerization

Consumerization and the proliferation of mobile devices, such as the iPad, iPhone, and Droid, have resulted in an increase in both internal and external customers requiring support for business applications accessed via mobile devices, whether they are personal devices or are owned by the enterprise.

—HDI Strategic Advisory Board

How are you addressing the demand for support for smartphones, iPads, and the like?

Charles Jumonville: Currently, my organization only supports company-issued BlackBerry devices, which are very few in number. However, as you move around the organization, you see employees using all types of mobile devices for personal use, from simple devices all the way to top-of-the-line devices loaded with the most innovative apps. We are now looking at how we can harness this tremendous resource of knowledge and physical devices to our

organization's best use. We realize that we can't offer everybody everything because we would need to be very general. So, we're not sure if we're going to say, "Bring your own and we'll deal with you," or "Bring your own, and these are the devices you can bring."

Carrie Battaglia: As an outsourcer, HP is supporting not only company-issued devices, but also personal devices that run company applications, specifically Outlook. Although challenging at times, the current workforce wants to have the flexibility of having their personal and work e-mail available 24x7. Even as an HP employee, my Palm Pre runs my personal and work e-mail. We also find that our agents do quite well at this support, as it expands their learning to more than PCs.

Darin Vandecar: We are making very specific decisions about which devices we will support from each vendor. Each supported device must meet security requirements and be tested for desired functionality and supportability. If it is not an approved (i.e., certified) device, it is not supported or funded by the organization, which pretty much ensures that all employees have certified devices.

How is the bring-your-own trend impacting your organization, and how are you responding?

Craig Baxter: It is not taking our organization by storm, but I believe the bring-your-own phenomenon is coming in a big way. We now allow people to use their personal mobile devices to access company e-mail. I have also heard that some companies are simply giving employees a stipend for purchasing whatever device they choose. Many people like the convenience that tablet technology affords and like to have a choice in what they use. As more and more work-related functionality is made available over the Internet through a browser, I see a day when there will be not only an option, but even an *expectation* that at least some people will provide their own computing and communications devices. The cost savings will be too great for some companies to ignore.

Carrie: I agree. As companies look for ways to cut costs, the bring-your-own trend will build momentum. In the 1990s, companies reimbursed employees for Internet service at home; that's rare today. Now, with the many devices we have to use in both our work and personal lives, people are moving more toward personal ownership. If I use my personal device at work, I'm going to use that device for both work and pleasure. That device, then, becomes part of my personal responsibility. People are becoming more knowledgeable about the how their devices work, and as the technology becomes simpler, these two forces will mitigate the need for support.

Craig: I am considering moving from my company-owned smartphone to a personal smartphone because of the range of features I can get with other devices. As a frequent traveler, those features can help me perform my job more efficiently. Plus, I get the convenience of being able to use it for personal e-mail and browsing. How will this affect support? I expect to get support if

I am having issues with accessing company e-mail. Beyond that, I assume I'll be on my own.

Dana Olson: We are allowing these devices and have a defined policy around general device access. This policy covers company-owned and personal devices and governs the way those devices connect to and use company-owned resources. We have different categories that provide different levels of access based on expected security requirements. Depending on the category, we may impose another layer of security to ensure policy compliance.

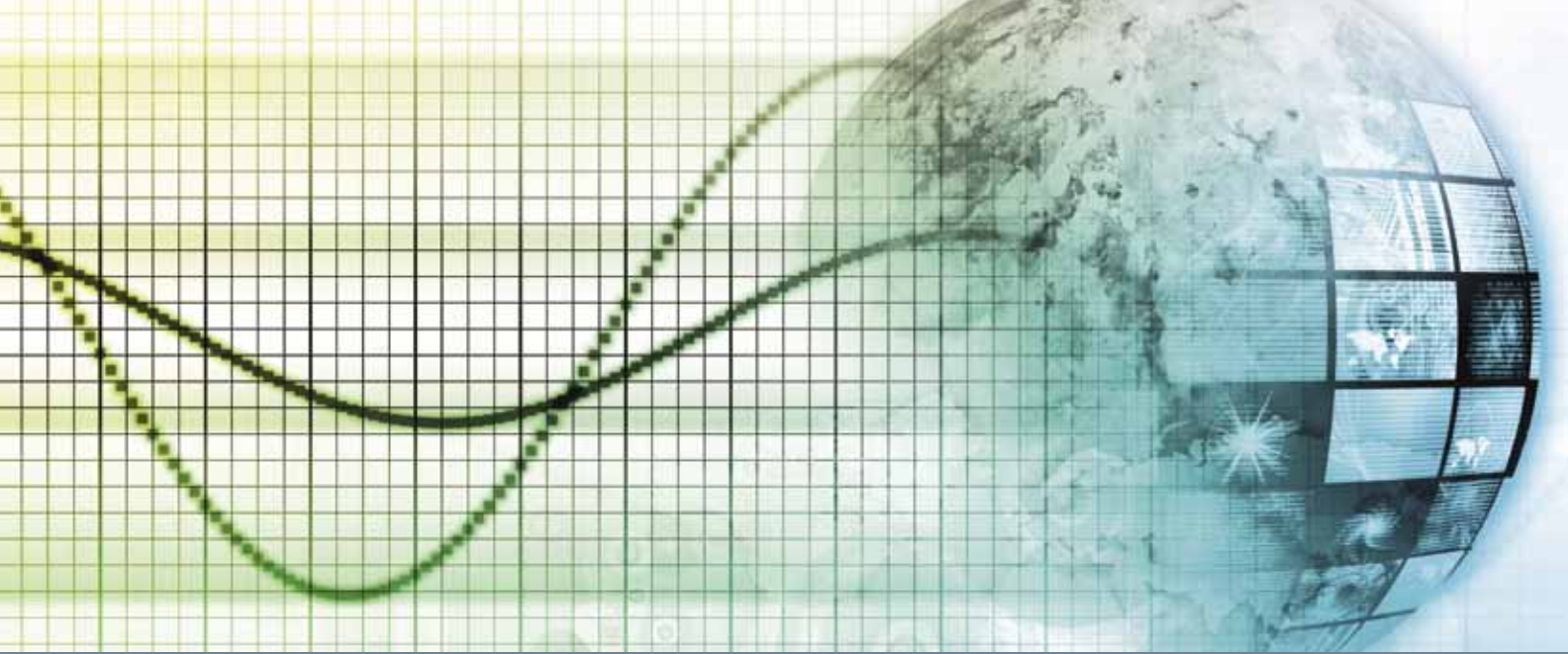
Craig: If companies want their employees to be fully engaged and functional, they will have to provide some level of support. But that could end up being much more about access and browser versions than the device and any other applications running on it. At the same time, companies will need to continue providing some employees with all of their computing needs (based on their roles), in much the same way that some sales positions are supplied with a car today. In addition, companies may provide computing and communication resources as a perk, making them more attractive as an employer. So, there will likely be a mix for some time to come.

You all agree that security is the primary concern with regard to mobile device adoption and use. How are you addressing this concern?

Dana: To reduce risk, we drive appropriate use through policies and device-based access security levels. We have policies around what data is saved at the corporation, what can be taken off site, and what cannot. If it is a company-owned device, we offer a full range of access; if it's a personal device, we allow most access, but we make sure those devices have virus software and other security features.

Charles: Today's users are very sophisticated, so when we bring these devices in, we won't have the education problem we're anticipating. It is going to be a security problem, of course, and we will have to deal with it as best way we can. But we're not going to let security concerns hold us back for very long, because it's like a big wave—it can't be avoided. We just have to solve those problems by establishing policies, enforcing those policies, and making sure the machines work properly.

Craig: Our policy requires you to have a password to access your device; if you lose it or if they detect too many failed access attempts, tech support can wipe the device remotely. But, also, as these devices get more sophisticated, the information that can be stored directly on the device is at risk. How do companies ensure they get this data back or prevent its loss when someone leaves the company? Of course, that problem isn't new; we encountered it back when we first allowed people to leave the office with their laptops (or with a floppy disk, for that matter—remember those?). So the problem is not really new, but we have to solve it. There isn't an option.



Darin: Security is, by far, the greatest concern, but next is device supportability. We are placing a sharp focus on holding product and solution managers responsible for building supportability into their products and for reducing the number of contacts per install base out of the gate. In other words, we're holding the product owners responsible for the support costs associated with their products and making sure they focus on call prevention, training, and review of customer analytics as it relates to their products, to improve the customer experience.

How can companies take advantage of these new devices and leverage the technology to improve customer support?

Charles: Using these mobile devices, the organization has greater access to level 2 and 3 personnel when the workers are not at their desks. It also enables the support center to contact and support users when the technicians are not at their desks.

Dana: When organizations build apps that can be integrated with their current tools—self-service access, chat, and the ability to enter requests from a mobile device—they will really be able to leverage these devices. Also, regardless of the access point, the data must be housed in a central repository, giving users the full view of all requests, incidents, etc.

Darin: By ensuring that we have great knowledge management solutions, in the intranet and HR portal, that, for example, give employees one-stop, 24x7 access to the information they need to remain current. We currently offer specialized support to mobile device users because we want to make sure they are productive. But we also need to exploit social media channels since these are huge to the mobile device user groups.

Dana: I see this as a time for the support center to partner with other areas, like desktop, server, and application development, to ensure that they are evaluating and supporting operating systems

as a full platform. Today, it is usually approached by each area independently. The applications team says, "Our app that requires this OS." Desktop replies with, "Here is the OS we support." The server team says, "Our servers run this OS." When we take a service look at a platform, the device is no longer the focus.

Craig: There may come a day when computing devices and Internet access will be viewed much like transportation to and from work: you're on your own to get your car repaired when it breaks down. If I'm right about these implications, we may see a boom in the consumer technical support industry.

Desktop Virtualization

Desktop virtualization, or separating the personal desktop computing environment from the physical machine using a client-server model, is on the rise as an IT infrastructure model of choice. Everyone agrees that cost and time to repair are key drivers of this trend.

—HDI Strategic Advisory Board

Is desktop virtualization creeping into the IT infrastructure or taking IT by storm?

Craig: More evidence of the eventual thinning and virtualization of the desktop space is appearing all the time. It won't happen overnight, but it appears that the world is moving further away from heavy, desktop-centric computing and more toward cloud-based, virtual solutions. The fact is that it has been happening since the onset of the Internet, albeit slowly, and has become a mainstream business infrastructure. I'm not suggesting that local applications and computing power will ever go away completely, but I personally believe we are witnessing an evolution.

Charles: Virtual desktop adoption is much slower than it could be at this point. But, as the cost of PC maintenance grows, I see the



client-server model as a way of containing costs and increasing the speed to solve incidents and service requests.

Craig: I recall being part of a large development organization that was convinced that all applications needed to be developed under a thin-client model and that we were merely a few years away from the death of fat clients and local applications. That was in 1995. Even though we still haven't seen the thin-client model evolve to that degree, think about how much more of your work today is done via an Internet browser than it was sixteen years ago.

Darin: This trend is being driven by both capital and support costs, as well as by a desire to have employees be more productive in and out of the workplace. Personally, I also think the trend in the virtualization of everything is creating a great deal of contemplation. In other words, how can we virtualize every platform?

How will desktop virtualization change the support organization and what do support leaders need to do to be a proactive part of the transition?

Charles: The support organization will need to focus more on server intervention than PC intervention. Leaders need to be involved in the design stage so that problems can be avoided and systems can be designed to be self-healing or require minimum intervention.

Darin: It will reduce both help desk- and desktop support-related support costs for the PC platform and move the focus to the back office. Leaders need to ensure that standards are created and that products are tested, approved, and certified for support. We also need to make sure that our staffs receive the proper training and that "design for supportability," in general, is a top consideration among the product management groups that deliver these solutions.

Dana: There are still up-front costs; however, I don't think the trend is to replace the entire desktop at once. I recommend piloting VDI on very specific applications. By working on a tricky application that is delivered on multiple platforms today, the organization can reap the benefits on a small scale. That involvement should help gain the buy-in needed for a more massive deployment.

Craig: I can't give a specific point in time, but I see a thinning of the desktop support role with more of its responsibilities migrating to the service desk. At some point, I envision desktop support having more of a fulfillment role, with the bulk of support coming from centralized locations and self-help. This has already happened at our office. While it is not due to true desktop virtualization, there is no formal desktop support at our location. Remote support tools are critical to our operation. Support leaders will need to understand the timing of this migration and make sure their people are up to speed on the virtualization infrastructure, where resources reside within the cloud, and how to resolve access issues.

Cloud Computing

More and more organizations are looking to the cloud as the infrastructure of choice.

—HDI Strategic Advisory Board

To round out the topic of workplace virtualization, what trends are emerging as a result of cloud computing and what are the implications for support?

Darin: I believe that those companies that move their CRMs or trouble-ticketing systems into the cloud can focus more on the customer and less on system upkeep and maintenance. However, there is a stickiness to these solutions—constant cash flowing to the vendor, with greater and greater dependencies over time—that will put them at risk if the high-level strategy is not fully supported by the executive teams that oversee their budgets.

Charles: Depending on the model, the support center has little insight into what is really going on under the covers. Perhaps we don't have to know, but maybe it is affecting what we are doing. Cloud computing shifts the burden of operation from the organization to the cloud vendor, if it is a public cloud. The expertise we poured into our servers moves out to the cloud as well, and it becomes someone else's duty to manage the servers, keep them up to date, and make repairs when necessary. The cloud relieves us of that, but we're still responsible overall, and we will become more concerned with managing the end point.

Craig: As Charles suggests, the cloud brings a new level of complexity to incident and problem resolution. Moving the computing resources and assets out of the enterprise and into cloud resources is going to challenge the support organization's ability to determine the source and root of issues. With the added layer, it will be more difficult to isolate the location of problems, especially if enterprises have a mix of resources in the cloud and on premises. While there is certainly a lot of business value to moving in that direction, you're going to need very strong relationships with your cloud vendors to resolve issues in a timely fashion.

Darin: This is going to have a huge impact, creating a high demand for both internal and vendor resources with specialized skill sets that are able to troubleshoot cloud solutions. These solutions eliminate a lot of the low hanging fruit for support centers and create much more complex and business critical support scenarios. I think this is both inevitable and good for the support environments of the future, as long as they are preparing themselves with the right resources and training programs.

Jeff Rumburg: What strikes me is that what it's going to take to be more successful in the future is not that different from what it takes to be successful today. The critical success factors aren't going to change that much from a tactical perspective. What is going to change is the way organizations strategically embrace these solutions, or don't. The issues mentioned around security and root cause determination belong at the strategic level in the organization, not the tactical level. Managers, both inside and



outside of IT, need to be proactive about what they will support and what they won't, trying not to be all things to all people, supporting everything through every channel. As workplace virtualization and cloud computing enter the organization, these have to be conscious decisions based, ideally, upon a business case analysis.

COST CONTAINMENT, FINANCIAL ACCOUNTABILITY, AND ROI

Cost containment pressures continue to change how technical support is structured and delivered. As a result, service desk managers need to become more financially savvy, apply an ROI mindset to the business, build more business cases, and analyze the various financial models for support.

—HDI Strategic Advisory Board

What are the most effective ways you would recommend to drive costs out of the equation without destroying the level of service?

Charles: We're looking very closely at the thin-client model, seeing where it fits best, because a tremendous amount of money can be saved in that area. We will probably be replacing all the PCs in our organization in two years.

Carrie: At HP, we are focused on ticket elimination on behalf of the clients who have outsourced their support operations to us. One of the biggest initiatives is looking at ticket drivers across multiple clients and multiple environments. The service desk is driving much of the analysis. Along with password resets, we're finding that messaging is a top ticket driver. We ask ourselves, "What can we do better in terms of how we stack up the messaging environment?" We go straight to the messaging team, show them all the tickets we get in different categories, choose the highest drivers, identify what might be driving these tickets, adjust that issue, and then no one calls us on that again. It's truly a ticket *elimination* process. We are looking at this across the globe, at a very granular level within single-client teams, and also at the aggregate of all the tickets that HP might process. We're learning key lessons in this area and are truly eliminating tickets so that end users do not have those incidents again. It's a big driver, but also a big cost saver. Considering the productivity losses that are resolved on the part of the end users, the savings are actually quite substantial.

Darin: We are putting greater focus on delivering the right self-service solutions—more powerful, role-specific, rich media solutions—and incorporating social communities into those solutions.

Jeff: Since both the service desk and desktop support are labor-intensive functions, managing labor costs is the key to containing costs. Agent utilization in the service desk and technician utilization in desktop support are key cost drivers. By tracking these metrics, and establishing a performance target for each metric (50% agent utilization on the service desk and 65% technician utilization for desktop support are recommended), you can contain overall labor and support costs.

Craig: I would add a variety of interrelated action items to these suggestions: the adoption of robust tools, including good self-support solutions that are easy to access and connected to a strong knowledge base; effective remote support tools; virtualization of the desktop environment to the extent that a good business case exists; and financial training for support managers so they understand the true cost of support and can promote good decision making with respect to staffing and the support infrastructure.

What key metrics do organizations need to focus on in order to measure improvements—not just incremental improvements, but broad improvements in efficiency and effectiveness?

Jeff: Most support organizations make a couple of common mistakes. The first is that they don't track the right number of metrics. At the level 1 service desk, they track too many—on

average as many as twenty-two—which is way more than they need. At desktop support, they track too few or none at all. The second common mistake is that they don't leverage metrics to their full potential. There's this notion that metrics are there to track and train your performance. That is true, but if that's all you use metrics for, you're missing the bigger potential when it comes to key performance indicators. We advocate a holistic view of performance metrics, meaning that you not only use them to track and trend your performance, but also them to analyze your strengths and weaknesses, and that you use that analysis to plan and act on activities that enable you to improve performance. This is the disconnect for many organizations—they track metrics but don't turn them into intelligent management actions that enable them to, on the one hand, contain costs and, on the other, deliver the best customer experience.

Carrie: Focus on all of the metrics related to first contact resolution—percent resolved and percent resolved without call back, for example—and drive improvement programs that will increase your resolution speed and decrease talk time. In addition, look for ways to drive to self-solve, including giving end users access to your knowledge management system. Track your users' use of the knowledge management system with pop-up surveys to determine whether your knowledge management system is user friendly and actually helps to eliminate tickets.

Darin: I also think we will continue to monitor the percent of tickets resolved at each tier, starting with tier 0—self-service (systems helping people) or social networks (people helping people)—and then move as much as possible from desktop support down to the help desk.

What business acumen will support leaders need to demonstrate to be effective in the future?

Craig: The expectation for business acumen needs to be pushed throughout all levels of leadership and management in the organization, including the service and support organization. We're going to see more demand for training people in these types of skills and a growing expectation that new managers will have a solid understanding of ROI. An ROI mindset needs to be a requirement for all new hires, for every purchase they make or recommend, every process they change, and any recommendations they make that have cost or revenue implications.

Charles: Support center analysts often have difficulty making that transition to manager or supervisor because the positions require different skills. They need to focus more on performance metrics and the financial and motivational aspects of management. If we hire the right people, it makes things a lot easier. When you are hiring staff for the support center, those agents need to understand what a call costs, know the value of a customer being in service, and what it costs the customer when that service is down. They



will understand that they need to get customers back in service quickly, because it is costing them money. Once we get our agents thinking in those terms, they just build on that foundation when they become supervisors and managers.

Jeff: All leaders need the ability to put together a credible business case for any new investment, including, for instance, new hires, new technology, outsourcing/insourcing, and consolidation. As Charles suggests, they need an understanding of the cause-and-effect relationship between key performance indicators for the service desk and desktop support, with a bias towards action/proactivity, and the ability to measure the results of these actions.

Darin: I think the skills a leader needs to be effective in our field must include a combination of strong business and financial acumen and technology skills. If you are lacking in any of these areas, you will struggle. But leaders also need to be able to create a vision that supports the organization's strategic objectives, and then sell that to all levels of the organization. To me, this is first and foremost.

In light of the changing global landscape, emerging support models, and new cost containment initiatives, how will sourcing options evolve?

Carrie: The Millennials have been raised on technology, so as this and later generations come into the workforce, we will see an increase in self-solve. Also, I expect that more complex work will have a better ROI for near-shore locations. We are already seeing clients segregating their populations based on who receives support from North American versus Asian locations.

Darin: Many companies will begin to rethink the off-shoring of critical support services. As Carrie suggests, more and more companies will focus on building strong web-based content to help offset the effect of bringing work back to the US or North America. I also think we will see more combinations of virtual/on-site support, where virtual support is provided off-shore and on-site teams provide the next level of support.



Jeff: It's increasingly difficult to make a business case for outsourcing, unless you are willing to go off-shore. For desktop support, which can't go off-shore, it is virtually impossible to make a business case for outsourcing on financial grounds alone. Other factors, such as lack of scale, are needed to override financial considerations when making a business case to outsource but remain on-shore.

Craig: As challenging as some off-shore sourcing experiences have been, companies will continue to leverage lower-cost options. At the same time, I think the consumerization of IT and the bring-your-own revolution could result in a consumer-oriented sourcing phenomenon. **In other words, as people migrate to using their own devices, at least some of the burden for supporting these devices will fall on them.** As companies move in this direction, it could bolster the consumer-focused support industry domestically, decreasing the need for the same degree of off-shore support.

What dynamics are needed to drive positive results with an outsourcing strategy, whether on-shore, near-shore, or off-shore?

Carrie: A strong partnership is a critical component of outsourcing, where the client's and the outsourcer's goals and performance measurements align at every level. For example, if both the client and the outsourcer are held accountable for customer satisfaction, then the client will work toward improving the way it sets its end users' expectations and it will hold the outsourcer accountable for delivering on those commitments.

Darin: I think it is most important that the organization has a good grasp of the service it's managing before it even considers outsourcing. In other words, the biggest mistake is outsourcing something you don't fully understand or cannot fully measure. Next have a great strategy for both sourcing and shoring. Each company I've worked with has different strategies based on different business objectives and priorities.

Jeff: These relationships need to return to basics, with a focus on cost and quality: cost per contact for service desk, cost per ticket for desktop support, and customer satisfaction as the quality measure for both. Outsourcing contracts have become so lengthy and complex that these simple metrics, with incentives for strong performance and disincentives for weak performance, have gotten lost. The result is that many buyers of outsourced support services can't really tell you how their vendor is performing. A simple scorecard, agreed on with the vendor and updated monthly, can cut through most of the clutter and greatly increase the effectiveness of managing outsourcing contracts.

CUSTOMER EXPECTATIONS

With the increasingly mobile and virtualized workplace, customers expect that support will be available to them anytime and anywhere.

—HDI Strategic Advisory Board

As companies adopt multichannel support strategies in an effort to reduce costs and improve service, and as customers expect more choices and flexibility to solve problems on their own time, 24x7, web-based self-service is gaining focus and adoption.

—HDI Strategic Advisory Board

To what extent is the attention placed on social media today a fad, just one of many channels to exploit, or a dynamic that will dramatically change how people receive and deliver support in the future?

Craig: I don't think it's a fad. People are clearly using it in both their personal and professional lives, and in a big way. As it becomes a more prevalent business tool, it will require more and more support from service organizations. But I also see it evolving as a support tool. I don't ultimately know where it will go, but I do see it as another form of self-help. Also, companies are foolish if they are not monitoring chatter about their products on social channels as a form of problem identification and customer satisfaction measurement.

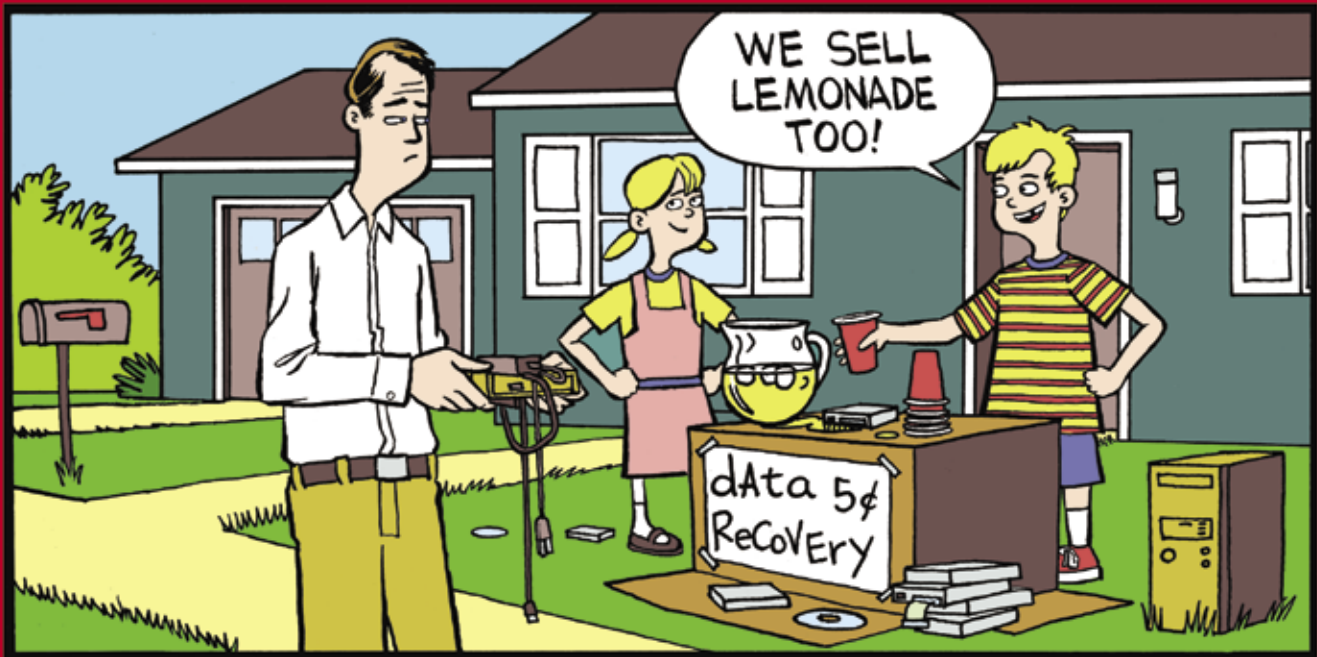
Dana: I see social media channels as a huge opportunity. Social media is already used for support. Unfortunately, people go to their friends and those friends may not have an acceptable or accurate solution, which might end up causing more problems down the line. But take a walk back in time and learn from the past. Think back to the 1980s when just getting access to the Internet required multiple signatures. Management back then saw the Internet as a hindrance and a productivity waster. Where would we be today

without it? The same is true for e-mail. Everyone was concerned about leaks and regulatory issues. Now, here we are with social media. The key is to embrace it. Look for ways to integrate it, help it to be a change agent, and use it to drive innovation.

Darin: Social media channels are being used to bring internal support resources together with customers, vendors, and partners to jointly solve complex technical challenges and problems in real time. Companies need to learn to harness these "free" resources.

How can organizations use social media to advantage, without increasing costs, and integrate it as a support channel?

Dana: It depends upon your willingness to view social media as an enabler. From both the support side and the business side, the organization needs to evaluate social media and define a strategy. If a support center is going to adopt social media, it needs to be a rollout like any other implementation. That means social media needs to be integrated in such a way that the support center maximizes efficiency and maintains existing history and knowledge. It needs to be communicated and promoted. Add links to your support page and e-mail signatures, to encourage people to use the new options.



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Carrie: One of the key metrics we should be looking at is agent satisfaction, and social media is a great way to drive agent satisfaction. When I use social media for quick communication and to share our progress on certain metrics we're tracking or send out a heads-up on upcoming changes, my agents let me know how much they appreciate this. **We need to consider not only how we use social media to serve our customers, but also how we use it to serve our agents and create a trendsetting environment for the young people on our desks.**

Charles: Our employees are already using social media outside the workplace, and if we can capitalize on these existing resources, then we can use it to the organization's advantage with little cost.

Dana: Organizations also need policies, procedures, and even training to help people protect their personal privacy, understand who can represent the company on social media sites, and who owns any "situations" posted on social media.

How can companies leverage these channels to bring customer service forward as a company differentiator?

Darin: I see customer service becoming a bigger and more strategic differentiator, with fewer companies differentiating by product, as Apple does. The ability to differentiate products and services is more difficult in this age of immediate and full disclosure via Facebook and Twitter. When you go online, you can quickly locate information on any company's products and services. More than ever before, I see people making purchasing decisions based primarily on the level of service the company provides rather than the quality of the product or solution. This is a trend that will continue to grow in our service economy.

Dana: Web-based self-service can definitely help reduce costs. However, a support center has to be mindful of the organization's image. Companies can lose credibility and loyalty if the process feels robotic. Whether support is in-person or self-service, each channel needs to make sure the problem can be resolved and that the end user receives the support he or she expected. Keep the process the same for each channel. If you collect feedback after a call, make sure you collect feedback after a self-service interaction, too.

Darin: Today's end users want instant gratification and instant access to the information they desire. They know how to use the Internet to get it and are willing to do so on their own time. Companies must learn to direct customers to the right channels, whether those are social networks (discussion forums, wikis, Facebook pages, etc), online search engines, online web requests, chat, or the phone. Equally important, users that start on the web and don't find what they need will, when they contact the support center, expect that the agents on the other end of the chat window or phone line will know what they have already tried. Channel integration will be critical.

CHANGING WORKFORCE DYNAMICS

Increasing technical complexity and rapidly emerging new technologies are changing the skills profile for the technical support workforce and driving an increasing demand for higher-level support desk analysts. This has made finding the right people with the right skills is increasingly difficult.

—HDI Strategic Advisory Board

To what extent is the reliance on virtual workers (i.e., employees working from home) evolving in this climate?

John: From a staffing perspective, we're seeing an increase in demand for "at-home" workers. Not only can this help organizations cut some of the costs

associated with maintaining a physical presence, but it can also serve as a powerful recruiting and retention tool. As the talent pool tightens and gas prices remain high, many employees appreciate having the ability to telecommute.

Dana: We will see a spike in virtual workers as organizations realize three benefits: (1) lower expenses through reduced facility costs; (2) shorter incident resolution times (service centers that aren't offering 24x7 support will be required to increase their hours to achieve this benefit); and (3) improved skill sets derived from a more diverse hiring pool. By enabling work-from-home options, the support center can reduce its footprint, and individuals in different geographical regions can provide follow-the-sun support. In addition, offering work-at-home options opens up the labor pool, perhaps attracting a more skilled staff to your organization.

Carrie: Companies are looking at virtual workforce models not only for cost savings, but also to tap a workforce that can work at peak times only. This option will become more critical as the Baby Boomers retire from full-time positions and seek part-time jobs to work at their convenience. What a great market!

John: While offering remote working arrangements is certainly one way to affect costs and attract employees, it's critical that employers avoid some common pitfalls. For example, employees may feel a diminished sense of corporate culture. Over time, remote workers may lose their sense of being part of the team. Service managers need to help remote workers feel included, by, for example, inviting them on group outings, as appropriate, and offering the same access to training opportunities other staff receive.

Some executives may also equate the quality of one's work with how often they see or speak with that person. While support centers partially avoid this problem by using ticketing systems that can track employee efficiency, the issue may not be totally mitigated. It's important, therefore, that both employees and their managers keep the communication channels open and communicate often.

What creative staffing solutions are needed to meet the skill set requirements associated with today's rapidly changing support scenarios?

John: What we see, unsurprisingly, is that the need for more or fewer support center professionals tends to come in cycles. When organizations implement new software, upgrade their systems, or put new processes in place, call volume increases. Unfortunately, a support center that was properly staffed before a software upgrade is often woefully understaffed once the upgrade has been implemented organization-wide. This can have a detrimental effect not only on support center staff, due to burnout and, ultimately, job satisfaction, but it can also substantially cut into productivity across an organization when employees are forced to wait longer for answers to their IT-related questions.



We're seeing more organizations anticipating these cycles and moving to variable staffing models versus fixed staffing models. Basically, a core group of full-time support center professionals are supplemented during busy periods by contract professionals who often specialize in supporting the users of the software or hardware that's being upgraded.

What are the new responsibilities and skill set requirements for support workers in the future?

Craig: We're going to see a continual evolution of the virtualized desktop environment. That doesn't mean support goes away. Rather, support will become more centralized, shifting the emphasis on where the support occurs and perhaps lessening the need for work to be done at the workstation. The other side of that scenario is that as things spread across the cloud, as people are using their own devices and accessing the enterprise through their own ISPs, the skill sets in that centralized environment are going to increase and the problem-solving skills will have to increase as well.

Darin: There is a huge opportunity here to be part of something the organization values. There will be more meaningful and challenging work, and that shift will demand that employees come with more than just technical and customer service skills. The single most evident skill is being able to work effectively with diverse teams to solve problems. That means working with



social communities, competitors, vendors, and consultants, not just peer groups, and they need to be able to influence and communicate across functional lines.

John: Customer service and soft skills will continue to play a key role. Soft skills, in particular, are probably more important now than they have ever been, especially for support center professionals who are interacting with employees or customers 24x7. It's no longer sufficient for many organizations that the support staff simply "gets it fixed." They must be able to correct the issue while remaining mindful of customer service. This often involves boiling complex technical issues down into very simple terms that anyone can understand.

Dana: The support team needs a collection of individuals with diversified skills that complement one another. **From an individual perspective, it will be more important to have a range of knowledge than to become specialized. That range of knowledge should contain not only technical skills, but business skills as well.**

Charles: As we move more toward self-service—when people will come to us after they have been down in the trenches for a while fighting the problems—the issues are going to be more complex because the end users will have already solved the easier ones. And those end users are going to be in a greater hurry because they have already spent too much time trying to solve the root problem unsuccessfully. That's going to put greater demand on the service desk. The support team is going to have to fix more complex problems, quicker, and they will need good problem-solving and communication skills to carry them through.

Darin: Because more and more of the problems, issues, and needs will be resolved with tier 0 support, (i.e., no human involvement), those issues that remain to be resolved by technical support employees will become more and more complex. It will be critical that companies invest in their training and development programs, providing higher-quality and more-timely training.

What trends in compensation and rewards will the industry likely see?

John: We see the competition for talent increasing substantially. Companies are coming up with all sorts of creative ways to attract and retain top support center talent. Perks like paying for ongoing training, meals, increased time off, bonuses, referral bonuses, etc., are all becoming more commonplace.

Jeff: There is a wage paradox in support whereby increasing wages for support professionals actually reduces support costs. As you increase wages, up to a point, you attract a more experienced, better educated, more competent support professional. These professionals, in turn, deliver a higher quality of service—higher FCR and customer satisfaction and lower handle times, hence lower cost per contact; higher level 1 resolution rates, hence lower TCO—than their less-experienced counterparts. Many companies are aware of this phenomenon, but are still unwilling to increase salaries for new hires because of the perception that they might be overpaying their support professionals.

Progressive support organizations, however, are aware of this opportunity to improve performance levels by offering higher starting salaries, and have begun to move in this direction. **Surveys have shown that those organizations whose compensation for support professionals is in the top quartile for the industry have consistently lower cost per contact (level 1), lower cost per ticket (desktop support), and higher customer satisfaction than their lower-paying counterparts.**

What will the support organization look like in three to five years?

John: A recent survey by our company found that nearly half (49%) of CIOs plan to deploy tablet computers in the enterprise space in the next two years. If you take a moment to think about that, the first commercially successful tablet was only released in April 2010, less than two years ago. The skill set required to support these devices simply didn't exist before then, and within two years nearly half of all companies will require that skill set of at least some of their support staff. The fact of the matter is that the most in-demand skill set for support center professionals two years from now could easily be for hardware or software that doesn't even exist today.

To take that a step further, because supporting and incorporating such a wide array of products requires a more technical person to be effective in the support role, turnover is increasing. Not only are the most skilled support professionals moving to new roles outside of their organizations, they are also being redeployed into more complex IT roles within their organizations. While this creates new career opportunities for service desk professionals, it also creates problems for support managers who are challenged not just with recruiting new talent, but also retaining that talent once it's been found.

Carrie: What I really want to believe in, despite the move toward more self-service, is that there will be more technical expertise in the support center, that the frontline support organization will own more activities, and that the support organization will always be at the table in IT discussions. Most support organizations will move more toward true service desk, SPOC models and become the key drivers of how the IT department runs the business.

Jeff: Technical support will become a more visible activity and function, not just because they are using more channels than they have historically or because volumes might continue to grow, but out of necessity, to ensure their survival (i.e., continued funding and support from senior management). The competent support organization, which I define as one that delivers high-quality service at a cost consistently lower than the industry average, must evolve into a strategic support organization, one that proactively manages expectations, making sure that the support organization understands its value proposition and is recognized for the high-quality services it delivers. Support managers

need to develop a set of business skills that will enable them to market, sell, and position IT support as a strategic source of competitive advantage, help minimize total cost of ownership, drive a positive view of IT, and return end users to productivity.

PANEL PREDICTIONS

Level 1 and desktop support will merge and a growing percentage of tickets will be resolved remotely at level 1, rather than by desktop support.

BYOD will become not just an option, but an expectation that some people provide their own computing and communications devices.

The virtual worker population will spike as organizations continue to lower costs, provide 24x7 support, and seek talent.

Due to an increasing volume of problems, more issues will be resolved at tier 0—that is, no human involvement.

Issues that can't be resolved at tier 0 will become more and more complex and require more technically expert support employees.

As cost pressures continue to rise, organizations will increasingly rely on selective off-shore countries for technical support.

The competition for talent will increase substantially.

No more lip service: Customer service will become the clear differentiator.



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.



Keep Your Eyes on the Road and Your Hands on the Wheel:

Why Managed Services Make Sense for Traditional IT and the Cloud

by Michael Halperin

I remember the first time I encountered the term “managed services.” I had a tough time wrapping my head around those two words put together that way—to me, the meaning was not intuitive. And even though “managed services” has been in common usage for well over a decade, many people still struggle with understanding what it really means. I believe this is because the term itself is an awkward one for describing this particular concept.

So, when people ask me to explain managed services, I tell them to substitute a different term: **IT Management as a Service**.

In today's world of “Anything-You-Can-Think-Of-as-a-Service,” is this just jumping on the bandwagon? I don't think so. Because just about any *_aaS* you can come up with is a managed service. Consider the following definition:

Managed services is the practice of transferring day-to-day IT management responsibility to a third party as a strategic method for improving the effectiveness and efficiency of operations.

Of course, this definition raises another flag: what does “IT management” mean in this context? For the purposes of this discussion, we can think of it as all of the functions associated with the IT lifecycle, including:

- Planning and acquisition;
- Provisioning and configuration;
- Ongoing operations and maintenance;
- Issue identification and resolution (this includes IT support); and
- Capacity management.

Performing these functions requires the support organization, whether it is internal IT or a third-party (i.e., external) service provider, to have:

- **Staff** with the skills and bandwidth to perform the functions in the IT lifecycle;
- The **platforms and tools** to support these functions;
- **Processes** that allow these functions to be performed efficiently and consistently; and
- The appropriate **facilities**—be they physical or virtual—to bring all of these functions together.

Why Hire an MSP?

Managed service providers (MSPs) have already invested in the staff, platforms/tools, processes, and facilities that enable them to execute the IT lifecycle better, faster, and/or cheaper than an organization could. MSPs are typically centralized facilities that support multiple organizations, so the investment required to build and evolve an MSP’s capabilities is shared by the entire base of organizations the MSP supports.

Steady-state organizations that are happy with their IT management performance are unlikely to say, “Well, this is working...let’s try something else.” Rather, the decision to consider outsourcing IT management to an MSP is often triggered by some sort of compelling event. Here are a few examples:

- **Sudden loss of critical staff:** This could be as simple as the departure of a critical technical resource. I know of an organization that had two key IT staff members quit on the same day. Rather than backfill those positions, that organization decided to hire an MSP. Beyond voluntary departures, budget cuts may force an organization to downsize its IT staff and leverage managed services to replace the lost skills and improve bandwidth.
- **Exposed weaknesses in existing IT functions:** Disasters, security breaches, or extended customer-impacting outages can put IT operations in the spotlight. The postmortem following a painful operational incident may reveal gaps in the organization’s processes or tools, or find that IT’s

resources are stretched too thin to prevent or respond to incidents effectively. I’ve seen many organizations bring on an MSP in the aftermath of such incidents.

- **Rapid growth that IT can’t accommodate within its existing structure:** A happier scenario is the organization that is encountering rapid growth, either organically or via acquisition. Firms that outgrow their staff, tools, and processes can adapt faster, at lower cost and at lower risk, by outsourcing.
- **Frustration with IT’s ability to execute proactive projects:** Increasingly, organizations are looking to IT to help drive the core business. Staff productivity improvements, improved customer-facing processes, and faster time-to-market are some of the demands on today’s IT organizations. But the typical IT organization spends 70 percent of its resources managing and maintaining existing infrastructure and applications, leaving just 30 percent for the proactive projects that help the business grow. Outsourcing enables IT to refocus on these strategic opportunities.
- **The introduction of new technology:** Managing a new technology can mean retraining staff, introducing new tools, or revising operational processes. Any firm that is evaluating such investments should consider outsourcing as an option for quickly assimilating new technologies. As we shall see, cloud computing has many organizations considering MSPs.

Considerations for Selecting an MSP

MSPs are typically capable of supporting an array of technologies, including servers, storage, networks, security, IP telephony and service desk. But the decision to use an MSP is not necessarily an all-or-nothing thing. While many organizations outsource all of their IT operations to an MSP, this is usually typical of smaller organizations. Larger organizations often use a “cosourced” approach, in which internal IT retains ownership of some aspects of the IT lifecycle while outsourcing others. Similarly, some organizations may outsource only part of their infrastructure (e.g., only server management, only network management, etc.).

Evaluating an MSP is like any other hiring decision: fit is key. The right MSP doesn’t just deliver tactical services; it’s a strategic partner that helps clients achieve their business objectives. Is the MSP’s culture and approach a good match? If the hiring organization has some key strategic initiatives, does the MSP have any unique expertise that can help? For instance, some MSPs have developed processes or tools to address specific compliance requirements. Others may have unique experience with industry-specific applications. I know of one highly successful MSP that has carefully developed expertise in applications used by small accounting firms. Be aware, though, that some specialized MSPs may charge a premium for that added expertise.

Keep Your Eyes on the Road and Your Hands on the Wheel

Something else to keep in mind is that the majority of MSPs focus on small businesses (five to twenty-five users), so larger organizations would be wise to make sure prospective MSPs really have experience supporting organizations of their size and understand how enterprise organizations operate.

When it comes to coverage, most MSPs provide 24x7 coverage, though customers need to determine whether or not a given provider is truly “eyes on glass” 24x7, or if their 24x7 coverage consists of an on-call engineer with a cell phone on his nightstand. A customer that needs true 24x7 coverage is unlikely to be satisfied with the latter, while a firm that needs coverage only during business hours might not want to pay for the former. Many MSPs also offered “tiered” services, allowing clients to get more or less support (with a corresponding adjustment in price) depending upon their needs.

One final consideration relates to the MSP’s long-term direction. A long-term relationship is best for both provider and client, so the hiring organization should be confident that the MSP it’s chosen is ready to invest in new capabilities as the industry changes. Cloud computing, for example, is likely to have a significant impact on how MSPs operate in the years to come.

Managed Service and the Cloud

There certainly is a lot of hype in the industry about “the cloud.” So, let’s first make sure we are clear on what we mean when we talk about cloud computing.

Cloud computing means leveraging the IT infrastructure, not as physical or virtual devices, but as the capacity required to accomplish specific functions. Most organizations today make some use of SaaS, and this is a good example of cloud computing. The focus is on gaining access to the required application; the underlying infrastructure is invisible to the customer. Cloud computing extends this approach below the application layer to the underlying platforms and infrastructure. These are provisioned under a utility model, whereby the organization acquires capacity (e.g., computing power or storage), instead of servers and storage devices.

In many ways, cloud computing is simply a new way of managing traditional IT resources. But it provides many business benefits. These include:

- A dramatic increase in the efficiency of computing resource utilization, enabling organizations to reduce spending on new capacity;
- A dramatic increase in resource elasticity, allowing organizations to scale up and down at will, as opposed to building for peak volumes and having excess capacity the rest of the time;

- A dramatic increase in resiliency, improving reliability and reducing downtime; and
- A dramatic increase in the automation of IT processes (cloud computing can’t really be effectively implemented without automation), increasing speed and consistency.

Cloud computing impacts managed services in two ways. First, as we discussed, organizations consider managed services when a compelling event occurs, and the adoption of cloud computing is a very compelling event for any IT organization. Second, cloud service providers are, by our own definition, MSPs.

Let’s consider why the adoption of cloud computing will be a compelling event for IT, with profound impacts on all aspects of IT. As an example, let’s consider the provisioning and configuration step in the IT lifecycle, comparing the traditional and cloud approaches.

Traditionally, when an IT organization needs additional capacity, a new server is acquired, installed (or simply spun up, in the case of a virtual server), and loaded with the appropriate OS and software. When the organization needs to add or expand an application, it goes to its fleet of servers and chooses the appropriate device(s), adding more virtual servers or physical capacity as needed.

In a cloud computing environment, the organization doesn’t care which server(s) it uses, and it may not even care if it’s the organization’s server or part of a cloud provider’s infrastructure. The organization simply defines the capacity it needs and the platform does the rest. The specific physical and virtual servers and the associated storage are neither apparent nor relevant.

Few organizations have the capability to accomplish this today, so organizations that want to take advantage of cloud computing must establish the functions required to enable it. Some organizations will build it all internally; this is what’s referred to as the private cloud. In reality, only large organizations will have the resources to invest in the staff, processes, and (especially) the platforms and tools required to create and manage a private cloud.

Most organizations will instead deploy a hybrid cloud approach, in which existing IT resources are brought into the cloud in conjunction with service providers that specialize in delivering cloud-based solutions. Such providers fall squarely within our earlier definition of managed services. Small wonder many traditional MSPs are currently exploring options for migrating to the cloud.



Implications for Support: It's About Transparency

Cloud computing will clearly have a big impact on all aspects of IT, including support. In fact, the cloud compounds one of IT support's most complex challenges: gaining infrastructure transparency in a way that allows for issue analysis and remediation.

By definition, cloud computing makes the relationship between system behavior and the underlying infrastructure less transparent, not more. The issue becomes even more difficult when using an external cloud provider—as most organizations will—because service providers are unlikely grant their clients much access to the underlying infrastructure.

Even organizations that aren't yet pursuing cloud computing should begin thinking about how they will accommodate the significant changes it will bring to IT support. Cloud computing will use sophisticated platforms to automate many aspects of the IT lifecycle. These platforms will also collect critical information about the environment that will be needed to deliver effective support. For instance, there are tools and techniques for monitoring critical processes from the end-user perspective. These can raise alarms when issues anywhere in the chain impact the user experience. But that can happen only if we first identify those key points and make sure we gather the right information about them.

If support requirements are kept front-of-mind as cloud management platforms and processes are planned, it can greatly enhance both the support team's productivity and the end user's

experience. On the other hand, if support is just an afterthought, its quality and efficiency will suffer. Clearly, support organizations need to be involved in planning their organizations' migration to the cloud. This includes understanding how cloud service providers can help or hinder the support team's view of what is happening in the environment.

Whether your organization has recently experienced a compelling event or is planning a shift to the cloud, more and more organizations are looking to managed services (IT Management as a Service, if you will). But they need to understand what managed services do and don't do, and how MSPs fit their particular situations. The keys for any organization are understanding what its unique requirements are and finding an MSP that possesses the capabilities, approach, and culture to be a true business partner.



About the Author

As the VP of managed services at Green Pages, Michael Halperin leads the operations teams supporting diverse client infrastructure topologies, including virtualization, unified communications, networks, servers, and desktops. He is responsible for the development, marketing, and overall delivery of GreenPages's managed services portfolio.

Michael has more than ten years of experience in the managed services industry, and was named to the MSPmentor 250 list three years in a row (2009–2011).



The Keys to Success in the “New IT”

by David Cannon

Call it the cloud. Call it converged infrastructure. Call it hybrid delivery, or whatever the marketers come up with next. The fact is, the world of IT has changed. It's the “new IT.” But let's be honest: it's not altogether new, and it's not altogether IT. So what is it, and how is it going to impact the industry we work in?

The definitions of the cloud are as numerous as, well, the clouds in the sky. Each new definition is ostensibly the correct definition, better than the others for a number of reasons (usually because it supports the features of a specific product line or proposed solution). But all of them point to some common areas, and the ability to deal with these areas is critical.

The Business of Business

The new IT is focused on business, but not like before. We used to talk about IT–business alignment and how we would provide services to the business. We would pride ourselves on being able to meet our service level agreements (if we had them). But just providing good service to the business is not enough anymore. IT is *integrated* into the services and products our businesses sell.

In the new IT, IT will do more than manage a set of outputs. We will be asked to understand what the business does and how we enable it to achieve its objectives. We will be expected to prove that our services enabled the business to actually perform the activity that made it invest in IT in the first place, and that it was able to do so successfully.

When it comes to the new IT, we need to understand and be able to explain how the services we provide enable the business to achieve its outcomes.

Value

In the new IT, it won't matter to our customers *how* we provide our services. Finally, the technologists have caught up with the idea of IT services. We've always talked about end-to-end, seamless service, so this concept, which has made the cloud a hot topic, is nothing new.

But it's going to take a little more than cloud architecture to make this a reality. Value is defined by the consumer. No matter how well we define and sell a service, the customer will have the final say about whether they will or will not use a service (or whether they source it from us or someone else).

So what makes the difference? Again, value. If a customer believes that a certain service helps them achieve their outcomes and does so at a reasonable cost, then it is valuable. The new IT is making it easier for customers to find exactly what they need, at the price they are willing to pay.

The message is clear. If we want to succeed in the new IT, we have to learn what our customers value and we have to deliver it at a fair price.

Finances

It had to come to this eventually. If customers want to calculate the value of an IT service, they need to know two things:

1. Does the service enable them to meet their outcomes?
2. Does it do so profitably?

Most of us still use allocation to recover the cost of IT. In other words, each business unit pays a percentage of the cost of IT, no matter what services they use. In the past, we went to great lengths to avoid calculating and communicating the actual cost of individual services (e.g., charts of account incompatibility, corporate policies, no budget, etc). The end result was that customers got as much as they could and then demanded that we cut our costs, undermining our ability to provide quality services. It was a vicious cycle.

The reality is that, in the new IT, there are many companies that can and do calculate these costs. Many of them sell their services on a pay-per-use basis. If we can't demonstrate the cost of a service and link it to business outcomes, then the only thing we *can* do to show value is cut costs. And realistically, in these days of "do more with less," how much more can we cut?

The bottom line? Being able to calculate and communicate the costs and returns on individual services will be key in the new IT.

People

Interestingly, the most important thing to know about the new IT is that it is not really about the technology. Sure, technology makes it possible to virtualize processing, hybridize data centers, and deliver services anywhere and everywhere, on demand.

But did you see what happened when technology made it possible for people to work remotely and be more independent? They used it to meet, share, network, and socialize. The new IT is people-driven and people-delivered.



The Keys to Success in the “New IT”

Corporations that care only about the bottom line are finding things more and more difficult these days, while the companies that have placed their future in the hands of their end users seem to be finding it much easier to succeed. That's because, no matter what business we're in, the services and products we deliver are ultimately all delivered to people.

The new IT has made it possible to interface more directly with those people, to find out exactly what they need, and to get it to them wherever they are. Even more important, the new IT enables them to define their needs and communicate them to us directly, so that we can develop and deliver new services within days, sometimes even hours.

The moral of the story: Setting up and using these communication channels will be crucial in the new IT.

Technology

As it is in the current environment, technology will continue to be central to the new IT, and so, too, will be our ability to manage it.

The good news is that we have become very good at managing the technological aspects of our IT environments. We have more technical skill than ever before, and as technical training has become cheaper and more readily available, so has the technology itself. The new IT will accelerate this commoditization.

However, what we do with those systems still depends on the needs of individual organizations. We need the skills and business knowledge to be able to identify exactly how our systems are used and to predict new opportunities. This will require business and communications skills on an unprecedented scale.

The old technocentric IT has become a true business unit and, ironically, it is the advances in technology itself that have made this shift possible. At the very least, technical professionals will need to understand the business impact of what they do, but the demand for more advanced skills will undoubtedly increase.

One thing is certain: Survival in the new IT will require staff at all levels to develop their business and communication capabilities.

Information

IT organizations have traditionally focused on the technology side of IT. In the new IT, they will increasingly be asked to focus on the information side. Customers will look to IT to help them solve complex business problems, not just by providing them with applications and infrastructure, but by making information and knowledge available to them from a variety of sources.

In the new IT, IT will become more involved in the decision-making processes of other business units. For this reason, it is critical that

IT departments do not fall into the trap of thinking they can just hand over infrastructure or SaaS and assume that their customers will be able to use them effectively. That road is paved with costly infrastructure costs and business failures.

Information—and the ability to use it—is a key asset to any organization, and a valuable source of competitive advantage. IT has been tasked as its steward, and the new IT will require us to fulfill that task more diligently than ever before.

The key takeaway: The ability to understand the business's need for information—how to access it and how to use it—will be at the core of IT's mission in the new IT (just as it should always have been).

Organizational Integration

IT is a single service provider, no matter how many disciplines it has, so application development, enterprise architecture, project management, operations management must make peace with one another. We can no longer afford to maintain individual links with the customer. The new IT focuses on one thing and one thing only: delivering services that meet the customers' needs.

And it doesn't matter what's in those services. We can't continue to think that we each offer something unique to the customer. We don't. We only offer what we can collectively build and deliver as a single service provider.

CIOs will need to take up the challenge of forging a single service-providing organization that delivers value at a reasonable cost. This will never happen as long as different units in IT believe they're independent.

Governance

In the new IT, governance will go far beyond “Who is responsible for what?” That's a question of management, not of governance, and it can be answered using a simple RACI chart, provided we know what actions and processes we're doing in the first place.

The failure of IT governance has two causes. First, we still haven't figured out what we have to govern. CIOs assume that their direct reports are handling things without realizing that's actually *their* job. Governance is not the responsibility of any single process manager or service owner. It is the job of the highest-ranking executives in the organization, and it is being lost in the jumble of technology decisions knocking at their doors.

Second, we haven't yet figured out that governance is, like organizational integration, about one thing and one thing



only: ensuring that the organization is able to fulfill its strategic directive, according to mandated policies. Governance is about how we deliver value to the business and how we meet the business's objectives. How do we decide whether to move to the cloud, or outsource, or keep our legacy structure?

In the new IT, the CIO will own governance, and all direct reports will be held accountable for executing the organization's strategies under the direct supervision of the CIO.

Suppliers

The new IT will be even more dependent on third-party service provisioning, and IT will be asked to manage and coordinate these relationships on behalf of the business. The alternative is a mass of conflicting and overlapping contracts that reduce individual costs to the business unit, but result in huge costs for the enterprise.

IT will broker these services and manage the quality of the services provided, to keep the organization's value chain functional. This will take all the skills and capabilities outlined in this article. Third-party sourcing will not simplify IT's task; it will merely complicate it and magnify any existing shortcomings.

We will need guidance if we are to become value enablers, shifting our focus from outputs to outcomes. We will also need

to have a clear portfolio of services, detailing the costs and investments associated with each service. Finally, we will need to invest in our relationship with the business through a formal process of business relationship management.

.....

Fortunately, all of these areas, trends, and processes are fully documented in the ITIL 2011 edition of *Service Strategy*, which includes practical and achievable guidelines for establishing and managing these disciplines and navigating the uncharted landscape of the new IT. To order your copy of *Service Strategy*, visit www.best-management-practice.com.



About the Author

David Cannon is the coauthor of *ITIL Service Operation* (TSO, 2007) and *Service Strategy* (TSO, 2011). He is the chairman of the itSMF International Executive Board and a strategist for Hewlett-Packard. His work has put him in touch with customers and suppliers around the world, where he hears their triumphs, frustrations, and wishes.



KCS v5: KNOWLEDGE-CENTERED SUPPORT MOVES FORWARD

by Rick Joslin

I can hear it now: What? A new version! I am still trying to implement what I have learned. This has to be another ploy to make money. Now what will I tell my management? How can I justify moving to a new version? What's really new with this version? How long will the current version be supported?

This is a very common reaction to learning about a new release or upgrade to one's beloved processes and/or tools. But, here's the good news: with this latest release of KCS v5, you have options, and they're free. (Yes, free.)

The Consortium for Service Innovation is a nonprofit organization that, in 1992, leveraged the collective experience of its members to produce the Knowledge-Centered Support (KCS) methodology.¹ This past January, the Consortium for Service Innovation updated to the KCS methodology with the release of the KCS v5 Practices Guide.²

¹In 2003, HDI partnered with Consortium to develop the three-day Knowledge Management Foundations: KCS Principles course and share KCS with the market. In 2007, the KCS Principles certification was introduced to recognize individuals that demonstrated a strong command of the methodology.

²This and other resources are available online (<http://www.serviceinnovation.org>), and are free to the general public.

³Just before this article went to press, the Consortium released KCS v5.1. Any changes in terminology from v5 to v5.1 are reflected in this article.

THE EVOLUTION OF KCS

One of the Consortium's primary areas of interest is the evolution of KCS. Members meet regularly to share their experiences adopting KCS in different environments. Because the technology, people, and business objectives vary from organization to organization, no two implementations are ever the same, even when organizations are using, for example, the same technology. Likewise, the processes based on the KCS methodology will also vary, since KCS is a methodology that organizations leverage to define their processes. Through the adoption and continued management of KCS, member organizations make adjustments to their respective initiatives, and the results of these new techniques and processes are then shared with other Consortium members.

Changes to the KCS methodology itself are based on input from members, consultants, and instructors, who share their experiences implementing KCS in the real world. In KCS v5, you will see adjustments not only to terms, but also to the KCS model itself. A number of the changes were geared towards clarifying and simplifying aspects of the methodology to improve awareness and the implementation experience. They should make explaining and learning KCS easier and the terminology should better align with other service management best practices. Overall, the core concepts and principles have not changed; the new content simply augments the previous concepts. If you have already begun your KCS journey, there is no need to overhaul your initiative to align it

with KCS v5. You may, however, find some new techniques or ideas that can enhance your current implementation and improve your chances of success.

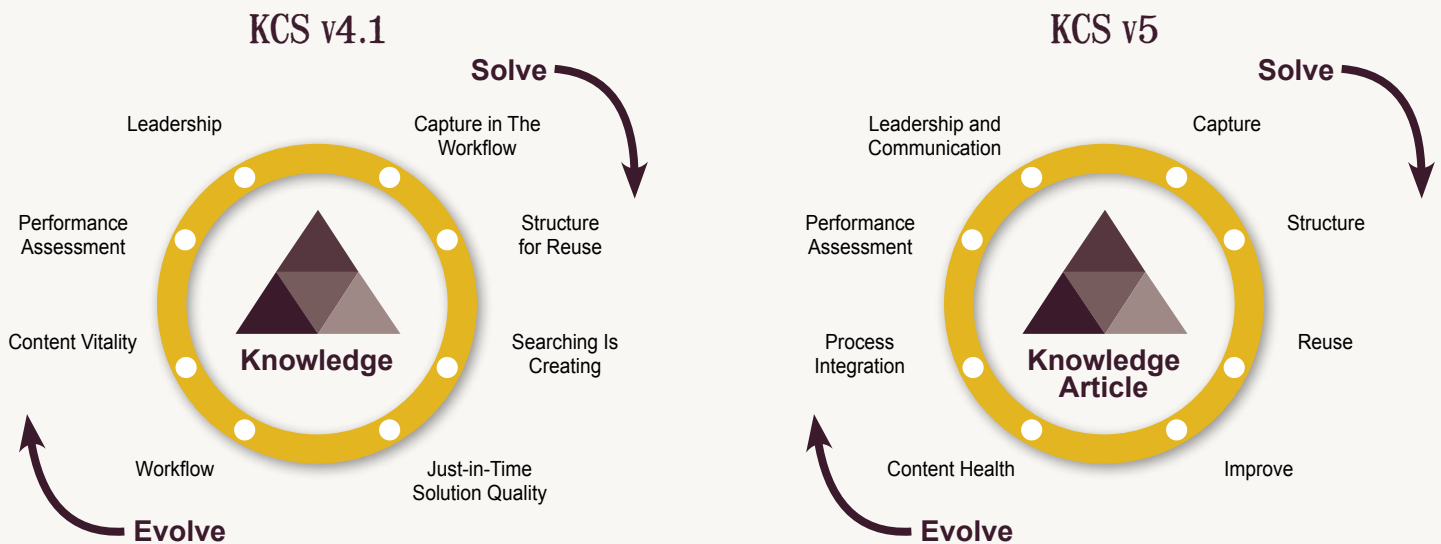
GETTING DOWN TO BRASS TACKS

Let's get specific. What are some of these great enhancements? The most visible change in KCS v5 is in how the model is presented.³ While the double-loop model remains the same, the names of the KCS practices have changed.

One of the first changes you will notice is the term *knowledge article*; in previous versions of KCS, this was referred to as a *solution*. A knowledge article is the name for the structured document stored in the knowledge base. This change aligns with current industry practices; Microsoft, for example, refers to these documents as knowledge base articles, or knowledge articles for short. There are many other terms on the market for a knowledge document, often based on the knowledge management technology provider.

The second important change is to the eight KCS practices, formerly referred to as processes. The Solve loop continues to represent transactional tasks, such as solving problem, and the Evolve loop still represents the systemic tasks that evolve practice maturity. However, as you will see on the following page, the eight practices have changed (the terms in italics are the pre-v5 terms).

THE KCS PRACTICES



Knowledge (articles) and the knowledge base are the output of the double-loop process.



THE SOLVE LOOP

- CAPTURE** This practice promotes capturing relevant knowledge, in the customer's context, during the problem-solving process, where tacit knowledge becomes explicit. (*Capture in the Workflow*)
- STRUCTURE** This practice emphasizes the idea that knowledge should be captured using a simple template or form to promote the consistency of the knowledge articles and to provide context for the content. Knowledge articles should be captured journalistically, that is, by capturing complete thoughts and not complete sentences. (*Structure for Reuse*)
- REUSE** This practice reminds us to search early and search often, as our perspective on the issue changes. It is important that we seek to understand what we collectively know before we seek to solve. If a knowledge article is found, then it should be linked to the incident record and reuse tracked. The initial search criteria can be reused to create a new knowledge article (if none was found) or to enhance an existing article that was difficult to find. (*Searching Is Creating*)
- IMPROVE** This practice stresses the importance of demand driving review, where knowledge is dynamic and

knowledge quality is reviewed and improved through reuse. Based on an individual's competency, the knowledge article that warrants modification will be either flagged or fixed. Knowledge is the product of support and must be owned by everyone. (*Just-in-Time Solution Quality*)

THE EVOLVE LOOP

CONTENT HEALTH This practice determines how quality is defined and managed. The organization must define the knowledge article structure, the style guide, the content standard, and the procedures for inspecting and managing quality, including a knowledge monitoring process and a review process for flagged knowledge articles. In KCS v5, this practice has been expanded to introduce the process of analyzing new versus known issues and assessing the value of knowledge articles, as well as some initial thoughts on self-service success. (*Content Vitality*)

PROCESS INTEGRATION The organization is responsible for defining, documenting, and improving its processes. It must also enable these processes with seamlessly integrated technology, to maximize efficiency and adoption. The incident management process should be based on structured problem solving and the knowledge management concept should be integrated with this process. Knowledge article reuse is a critical input to the problem management process. (*Workflow*)

PERFORMANCE ASSESSMENT This practice reminds us that we must clearly define the roles and responsibilities of the people related to the knowledge management initiative and we must update the performance management objectives for both the individuals involved and the organization. New metrics and reports are required to monitor the health of the processes and the results. When evaluating performance, multiple perspectives are required and a balanced scorecard approach is recommended.

LEADERSHIP AND COMMUNICATION The leadership is responsible for defining the vision, purpose, and objectives of a KCS initiative. Management must align the knowledge management initiative with the stakeholders' business objectives. Leaders are responsible for motivating employees and promoting teamwork, supported by a rewards and recognition plan. Most importantly, leaders must communicate, communicate, and communicate to ensure understanding. (*Leadership*)

In addition to changing solution to knowledge article, KCS processes to KCS practices, and renaming seven of the eight KCS practices, there were a number of other terminology changes made in KCS v5. The table below lists these changes, with the old terms in italics and the new terms in bold. Some of these changes were made to minimize the conflict or confusion between KCS and the terminology and concepts from the ITIL framework and ISO service management standards.

KCS v5	KCS v4.1	Explanation
Issue	Problem	Within the simple structure of a knowledge article, the <i>problem</i> field has been renamed to issue . Issue is more generic and can apply to a problem, a how-to question, an error message, a service request, an access request, or any other reason a customer may contact the support center.
Work in Progress (WIP)	Framed Solution	Work in progress , which replaces <i>framed solution</i> , was formally a state in the knowledge article lifecycle. The WIP state implies that the issue and environment have been captured and that the analyst is in the process of either searching for an existing knowledge article to reuse or solving the issue. An article in the WIP state will be discarded if an existing article is found. A WIP article could be used to modify an existing article and make it easier to find. It could also be used as the basis for a new article once the issue has been resolved.
Process	Workflow	The term <i>workflow</i> has been removed from the KCS terminology. In KCS v4.1, <i>Capture in the Workflow</i> referred to capturing knowledge in the problem-solving process at the moment of creation. Workflow as a KCS practice spoke to the organization's responsibility for defining processes and enabling them with technology. In KCS v5, Process Integration states that the organization is responsible for defining the processes and procedures (including technology) that enable the organization to leverage knowledge as an asset.
KCS Candidate	KCS I	These are individuals whose contributions must be reviewed because they have not earned their KCS license. In the previous version of KCS, the <i>KCS I</i> was defined as a candidate for a KCS license; in KCS v5, this is the KCS Candidate role. However, note that organizations implementing KCS can continue to call the role whatever is appropriate for their environments.
KCS Contributor	KCS II	A KCS Contributor is a licensed individual who can add and modify knowledge without requiring review. This role was previously referred to as a <i>KCS II</i> .
KCS Publisher	KCS III	A KCS Publisher is a person who is licensed to publish articles to the self-service website. This role was previously referred to as a <i>KCS III</i> .

In addition, here are a few notable enhancements and changes from the KCS v5 Practices Guide:

- The definition of knowledge assets was expanded from knowledge articles and people profiles to include account profiles and customer configurations. This is more in line with the ITIL v3 concept of all service management-related data being part of the service knowledge management system, which includes your CRM system and CMDB.
- Technique #3 in the **Capture** practice emphasizes the need to capture relevant content only, not every little detail. While this concept existed in KCS prior to this version, additional emphasis was added, as some people had misinterpreted the objective and thought everything had to be captured, whether it was relevant or not.
- Technique #3 in the **Reuse** practice emphasizes the idea that the initial search words are candidates for a new knowledge article or can be used to improve an existing article. This concept existed in KCS prior to this version, but KCS v5 reinforces the concept, as the initial search words are taken straight from the customer and their reuse increases the likelihood of finding relevant knowledge articles.
- Technique #4 in the **Reuse** practice emphasizes the value of linking found knowledge articles to incident records. This concept existed in KCS prior to this version, but was worth re-emphasizing, as reuse analysis is a key input to problem management.
- Under the **Content Health** practice, there are three new techniques.
 - The first is the **new-versus-known analysis**. By understanding the breakdown of incidents that relate known issues and those that relate to new issues, the organization will be better able to monitor the health of the knowledge base.
 - The second new technique is **self-service success**, which focuses on the knowledge captured during the assisted-service process. If captured properly, this knowledge can be used to enable self-service. An introduction to self-service success factors is included in the KCS v5 Practices Guide.
 - The third new technique is **assessing the value of articles**. Knowledge is an asset to the organization and, as an asset, it has value. This new technique introduces the topic and identifies some of the challenges associated with calculating the value of articles.
- The **Process Integration** practice introduces a new technique: **search tuning**. Tuning is necessary for improving

KCS v5: KNOWLEDGE-CENTERED SUPPORT MOVES FORWARD



the effectiveness of the search results and must be planned for when implementing KCS. This is one of the areas where continuous service improvement principles must be applied.

- KCSv5 also provides better guidance on leveraging knowledge to enhance problem management. The knowledge domain expert role encompasses some of the problem management roles and responsibilities: review knowledge articles with high reuse, eliminate the source of the problem, root cause analysis to further investigate the issue, and enhance the resolution, among others. This role has further expanded to include monitoring self-service usage to identify and fill gaps in the knowledge relative to a given expert's functional area of expertise.

KCS v5 is not something you have to start implementing today, and you don't have to stop your current implementation to align with it. However, it is something that KCS practitioners should understand, as it provides guidance in areas where many organizations might be looking to improve. At the same time, it's important to understand that KCS v4.1 is not obsolete. KCS v5 simply promotes existing concepts and introduces some new ideas and techniques that you can use to enhance, improve, and mature your KCS initiative. As always, KCS will continue to evolve through the shared experiences of those organizations that are working to enhance their knowledge management initiatives.

For additional information on KCS v5, download the free *KCS v5 Practices Guide* from the Consortium for Service Innovation's website (www.serviceinnovation.org).

To learn more about Knowledge-Centered Support, attend one of the three- or one-day workshops offered by HDI (www.ThinkHDI.com/KCS).

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About the Author

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HOW TO STAND APART WITH CERTIFICATION IN IT TODAY: BEING RELEVANT *AND* REAL

by Julieann Scalisi

As IT continues to revolutionize the way we work and play, it is becoming more important for enterprises to employ professionals with the right IT skills, who are able to keep up with and demonstrate proficiency in the latest technologies. It's no secret that if you're a professional working in the IT field, you're expected to continuously build your knowledge base to keep up with the pace of change. Although there are many ways to do this, official training and certifications, such as those offered by top IT vendors, give today's IT staff and job seekers a distinct advantage. Managers look to certifications to validate your skills and knowledge, and to gauge your commitment to learning and advancing your skills. Certification has never been

more relevant than it is in today's challenging economy, when IT pros are faced with greater competition and struggle to stand out from the crowd.

Today's hiring managers want it all: a university degree, years of real-world experience, and relevant certifications. If you're educated and you have the experience to back it up, you will have more of an edge in your job search if you have earned the relevant IT certifications. If you're a recent IT graduate who lacks real-world experience, you'll have a better shot at the job you want, and will be able to demonstrate true commitment to your potential employer, if you have advanced your skills by having earned a relevant certification. However, ultimately, certifications are a filter for hiring managers who have tons of résumés to review, giving IT professionals who hold them a clear competitive advantage.

Now, is that competitive advantage enough to get the job? Possibly. At minimum, it will probably help you land that first interview. Then it's time to demonstrate your depth of knowledge and show your potential employer that you meet the position's qualifications. Certification is just one way to demonstrate your ongoing commitment to maintaining your expertise and specialty in IT. Having the right type of certification will ensure your continued relevance, but being real in your approach to certification—preparing for and claiming it legitimately—is invaluable, not just to you in your career, but to your peers, your employer, and the industry overall.

SKILLS DRIVE SUCCESS

There is no doubt that the right type of training and certification pays dividends to IT professionals *and* the organizations that employ them.

Matt Emry, UnitedHealth Group's manager for virtual desktop services, can attest to the benefits of hiring a certified individual. "Being certified in a given field shows me the dedication and the desire to rise above other candidates," he said. "If I have two candidates and one of them has a certification, I will usually lean toward the one with the certification. Staying current is a large bonus when I am going through the hiring process."

Jared Hoover, IS engineer at Lancaster General Health, believes that legitimately earning a certification demonstrates an employee's or job candidate's aptitude on a specific product. "People can tell pretty quickly if you have a certification, but don't know your stuff. It is also a quick way for managers to find the technical person they are looking for."

"Many tests that I have taken helped tremendously with my work tasks," Hoover said. "They tend to cover not only the basics needed to set up the product, but also optimization ideas and

troubleshooting tips. There are a ton of little things I know that have helped my production environment because they were on the test. Not only has it gotten me hired, many of my raises were tied to getting certified."

Then there are IT project implementations. Findings by analyst firm IDC (www.idc.com) show that 80 percent of hiring IT managers believe that effective training is critical to the success of a project, while 65 percent agree that ineffective training contributes to project failures.

ASSESSING THE TRUE COST OF FRAUD

Although it may seem simple enough to move a résumé that lists various certifications to the top of the pile, or even hire that particular individual for the job straight away, businesses continue to struggle with a deeper issue during the hiring process: validating an individual's credentials. Hiring a poorly qualified candidate can be costly and detrimental to the organization's success. In fact, according to the National Student Clearinghouse (www.studentclearinghouse.org), US employers lose more than \$660 billion annually to occupational fraud and 50–80 percent of all résumés contain misleading or false information.

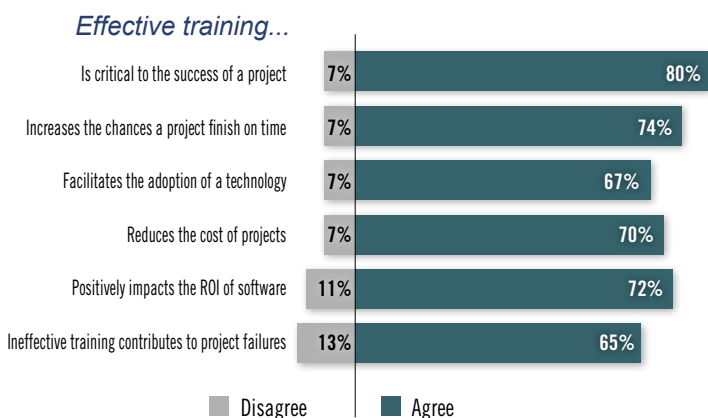
Typically, without explicit written consent from a potential or current employee, hiring managers and their human resources staff must go through a rigorous validation process for certifications. This can include time spent reaching out to certification vendors and consulting media experts to validate score reports and certificates to ensure they haven't been altered. Validating just one certification for one individual can take up to six hours, and, at \$80 per hour, that can really add up.

Most employers recognize this issue and conduct technical interviews during the hiring process to gauge the job candidate's level of knowledge and skills. Despite these precautions, it is still possible to hire a poorly qualified candidate who cheated on a certification exam. This is not merely problematic for the business's success and productivity; it also devalues certifications within the industry. Imagine if anyone was able to fraudulently claim a certification, and how that would impact the people who legitimately work hard, prepare for, and earn their certifications. These acts of fraud also devalue those certifications in the marketplace.

Emry couldn't agree more. "I don't think the industry as a whole values certification as much as they should. I believe this is due to ignorance of the certification process more than anything else. I think if people were to educate themselves on the process of obtaining the certification, they would find great value in it."

This is why companies like Citrix, Microsoft, Cisco, HP, IBM, and others invest time and resources into preventing certification fraud and maintaining the integrity and security of certification exams. Each of these organizations are active members of the Information

TRAINING: THE VALUE PROPOSITION



Source: IDC Certification Impact Study, 2010



Technology Certification Council (ITCC). The ITCC is a body of industry leaders focused on IT certifications and committed to growing professional certifications, recognizing the need for a qualified workforce to support the world's technology needs. The ITCC is a resource for employers, government officials, academia, and individuals seeking information about the many benefits of IT certification. Each ITCC member works with its test delivery partner to adopt security measures that prevent fraudulent activities and help maintain the value of their certifications and IT certifications in general. Collectively, the ITCC is becoming more active in promoting the value of certification through awareness education and tools that allow certification holders to more easily prove multiple certifications, and potential employers to validate them.

TECHCERTREGISTRY

The TechCertRegistry, an easily accessible, secure IT certification transcript, is a service provided by the ITCC (in partnership with Integral7) to professionals holding multiple certifications from different IT companies. The TechCertRegistry provides a transcript that validates all IT certifications held, preventing the individual from making false claims to certifications he or she hasn't earned.

Through the TechCertRegistry, IT professionals can easily report and present a full credential portfolio to current and potential employers and other parties almost instantly. The TechCertRegistry also allows candidate-authorized employers and third parties to verify a candidate's IT certifications using the candidate's universal

ID. To obtain a TechCertRegistry transcript, IT professionals must visit www.techcertregistry.com to create an account and claim all new and historical certifications.

The TechCertRegistry's current sponsors include Citrix, HDI, HP, IBM, LPI (Linux Professional Institute), Microsoft, and Novell. The ITCC is continuing to engage additional member organizations and certification sponsors to participate in the registry.

The TechCertRegistry is just one step toward improving credential validation and preventing the ripple effect of fraudulent certification. It provides IT organizations with a secure, fast, and cost-effective way to validate an employee's or potential employee's credentials. And the benefits will continue to be recognized over time. The ITCC TechCertRegistry holds IT professionals to a higher standard of credibility and enables greater overall trust within the industry, making it easier to work toward a higher level of success for everyone—a goal we are all constantly striving to reach.



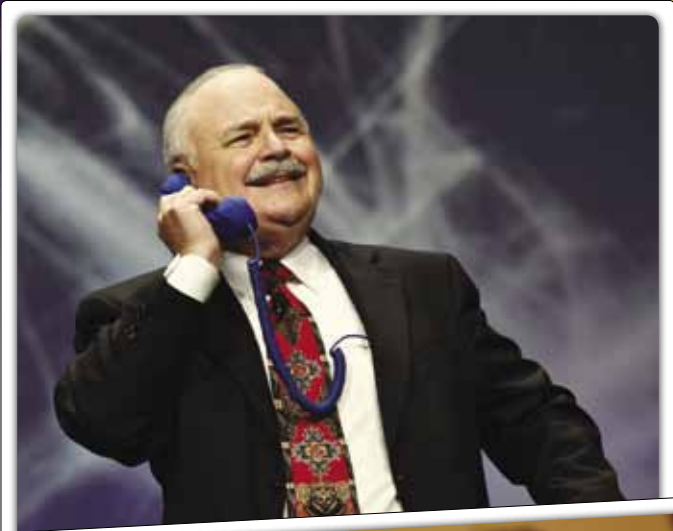
About the Author

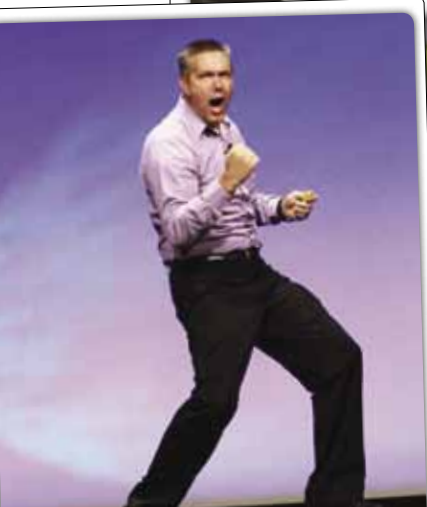
Julieann Scalisi is the managing director of global education for Citrix Systems, Inc. In this role, Julieann is responsible for the education business overall, including technical and sales training, as well as official certification programs for Citrix's partners, customers, and employees. Her number-one priority is creating a community of Citrix-smart people who can unleash the power of Citrix products and get the most value from their Citrix implementations.

FUSION 11

CONFERENCE & EXPO SCRAPBOOK







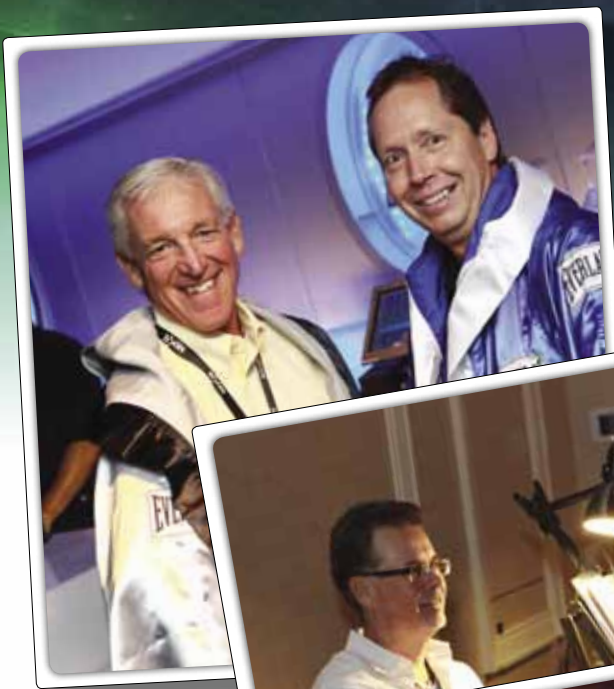
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community NEWS

Congratulations to CareTech Solutions, HDI's Newest Certified Support Center!



CareTech Solutions is a healthcare information technology company with in-depth knowledge of how hospitals work. CareTech's service desk professionals are experienced on all major hospital information systems and bring a vital understanding of clinical analysis to every call. Calls are fielded by trained support analysts in a state-of-the-art command center in the United States. Advanced infrastructure and application monitoring tools enable customers to observe systems via dashboards and reporting tools enable analysis and trending to bring call volume down. Monthly reports keep customers updated on end-user satisfaction and statistics like downtime, SLA performance, and service request management. CareTech's service desk is scalable to the size and scope of any hospital.



Accepting the award on behalf of the CareTech service desk is Karl Graham, senior director of the service desk, and Jim Giordano, president and CEO of CareTech.

Have a question about HDI's products and services?

Contact your regional account manager for assistance.



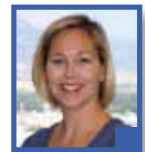
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You can also reach the HDI Customer Care Center at
800.248.5667 or **support@ThinkHDI.com**

HDI Certification and Training COURSE SCHEDULE

Schedule is subject to change. Check www.ThinkHDI.com/Train2011 for updates.

Certification Courses	Course Length	Public Classroom (Member Price/Price)	Online Classroom Length	Online (Member Price/Price)	January	February	March
HDI Customer Service Representative	1 day	\$795 / \$895	6 hours	\$345 / \$395	Delivered online and on site. Visit www.ThinkHDI.com/CSR for details.		
HDI Support Center Analyst	2 days	\$1,295 / \$1,395	10–12 hours	\$545 / \$595	19–20 Toronto 23–24 Dallas 23–24 Los Angeles 23–24 New York City 30–31 Chicago	3–17 Blended 6–7 Phoenix 13–14 Washington, DC 27–28 Boston	5–6 Philadelphia 5–6 San Diego 12–13 Atlanta 26–27 Columbus
HDI Desktop Support Technician	2 days	\$1,295 / \$1,395	10–12 hours	\$545 / \$595	—	3–17 Blended	26–27 Washington, DC
HDI Support Center Team Lead	2 days	\$1,495 / \$1,595	10–12 hours	\$645 / \$695	—	13–14 Irvine 16–17 Toronto 24–Mar. 9 Blended	19–20 New York City
HDI Support Center Manager	3 days	\$1,795 / \$1,895	—	—	25–27 Dallas 25–27 Los Angeles	1–3 Chicago 8–10 Phoenix 15–17 Washington, DC 29–Mar. 2 Boston	7–9 San Diego 14–16 Atlanta 14–16 Toronto
HDI Desktop Support Manager	3 days	\$1,795 / \$1,895	—	—	—	15–17 Irvine 29–Mar. 2 Atlanta	7–9 Chicago 28–30 Washington, DC
HDI Support Center Director	3 days	\$2,795 / \$2,895	—	—	—	—	7–9 San Diego
Knowledge Management Foundations: KCS Principles	3 days	\$1,495 / \$1,595	—	—	—	—	—
ITIL v3 Foundation	3 days	\$1,395 / \$1,495	14–18 hours	\$325 / \$350	—	—	—

Professional Development Courses	Course Length	Course Fee (Member Price/Price)	January	February	March
Advanced Proactive Problem Management	6 hours	\$545 / \$595	—	—	6–8 Virtual
Bare Bones Project Management	6 hours	\$545 / \$595	—	—	6–8 Virtual
Building Your ITIL Adoption Road Map	6 hours	\$545 / \$595	Visit www.ThinkHDI.com/BI for course dates.		
Building Your Service Catalog	6 hours	\$545 / \$595	24–26 Virtual	—	—
Change Management	6 hours	\$545 / \$595	Visit www.ThinkHDI.com/CM for course dates.		
Coaching Strategies for Extraordinary Performance	4 hours	\$375 / \$425	—	—	27–28 Virtual
COBIT Principles for IT Governance	6 hours	\$545 / \$595	Visit www.ThinkHDI.com/COBIT for course dates.		
Configuration Management	6 hours	\$545 / \$595	Visit www.ThinkHDI.com/CON for course dates.		
Financial Management Skills	2 days	\$1,495 / \$1,595	—	13–14 Atlanta	19–20 Dallas
Incident Management	6 hours	\$545 / \$595	Visit www.ThinkHDI.com/IM for course dates.		
ITIL v3 Lite and ITIL v2 Lite	6 hours	\$545 / \$595	Delivered online. Visit www.ThinkHDI.com/ITILV3LITE for details.		
Knowledge-Centered Support Fundamentals	6 hours	\$545 / \$595	—	7–9 Virtual	—
Launching Service Management and ITIL	4 hours	\$375 / \$425	—	28–29 Virtual	—
Mapping Support Processes	6 hours	\$545 / \$595	Visit www.ThinkHDI.com/MSP for course dates.		
Problem Management	6 hours	\$545 / \$595	—	7–9 Virtual	—
Release Management	6 hours	\$545 / \$595	—	14–16 Virtual	—
Service Level Management	6 hours	\$545 / \$595	Visit www.ThinkHDI.com/SLM for course dates.		
Service Management Essentials	6 hours	\$545 / \$595	Visit www.ThinkHDI.com/SME for course dates.		
Structured Problem Solving	2 days	\$1,395 / \$1,495	—	—	5–6 San Diego
Support Center Metrics and Measurements	6 hours	\$545 / \$595	24–26 Virtual	—	—

Three Ways to Register:

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