

How Big Is Your Umbrella?

Help Desk to Service Desk

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At some point during the last couple of years, you probably got the following question from your management: *Should our help desk become a service desk?*

But there's much more to this transition than a simple name change. It can entail a complete shift in the way you offer support to your end users and customers, so this bears some exploration.

Part of the difference between a help desk and a service desk is the scope of its function—the “size of its umbrella,” if you will. A help desk is often one component of a service desk, but there are several other distinctions worth mentioning:

- Help desks are mostly reactive: They fix things that are broken and answer questions
- Service desks are more proactive: They help manage services by handling service requests and all customer communications.
- Help desks generally give up incident ownership when it is escalated beyond Level 1; service desks typically retain incident ownership throughout.
- Service desks integrate more ITSM processes.

Service desk: The single point of contact between the service provider and the users. A typical service desk manages incidents and service requests, and also handles communication with users. (ITIL 2011 Glossary)¹

Help desk: A service providing information and support to technology users, especially within a company (internal). (HDI Glossary)

Before your organization embarks on this transition, there are some fundamental questions you should be asking about the organization's real needs. Moving from one model to the other can involve a lot of change, and that change should be aligned with your organization's strategies and goals. If you aren't sure about those, you need to sort out your strategies first.

Help desks, at least when functioning properly, have the difficult task of minimizing IT-related interruptions (i.e., failures, defects, and outages that stop the normal flow of work, etc.). Service desks should be focused on the lifecycles of organizational requirements. Unfortunately, HDI research tells us that only 29 percent of support organizations believe that their support center's strategic priorities are aligned with those of non-IT executives in their organizations.² If you aren't sure whether the transition from help desk to service desk aligns with your organization's goals, ask questions about those goals to make sure you understand them. This, according to some, is the critical difference between a help desk and a service desk: the help desk is focused on end users, while the service desk focuses more on organizational strategy.³

We shouldn't proceed further without stating something that should be obvious in the support industry, but isn't: Help desks and service desks *are not* software products; they are business units composed of people. When we refer to the software that powers these business units, we should always say so: help desk or service desk *solutions* (or *software*, or *tools*). Your help desk probably isn't refreshed every three to five years, but your help desk's or service desk's *software* very likely is.

¹ ITIL® and IT Infrastructure Library® are registered trademarks of AXELOS, Limited.

² Roy Atkinson, “Show Me the Value: Support's Mandate,” HDI white paper (November 2013), http://www.thinkhdi.com/-/media/HDI-Corp/Files/Research-Corner/RC_Business_Value_Nov13.pdf.

³ See Chris Mackey, “What Are the Critical Differences Between a Service Desk and a Help Desk?,” ARINC Managed Services blog (February 4, 2011), <http://www.arincmanagedservices.com/blog/2011/02/part-3-what-are-the-critical-differences-between-a-service-desk-and-a-help-desk>.

HOW BIG IS YOUR UMBRELLA?

Should My Help Desk Become a Service Desk?

This is a question many organizations have to face, and merely changing the name of the desk won't accomplish much of anything. As with any fundamental shift in the way operations are conducted, the decision to move from help desk to service desk should be made with a broad view of how the organization will make and support the change. Most transitions require investments of money and time, along with good organizational change management, and they cannot happen in a vacuum. Along with the specific changes required to make these changes comes a different kind of commitment to service management.

The first question is, *Would a transition to service desk better support business goals?*

There is some evidence that good service management, approached from a broader perspective than just "keeping the lights on" (i.e., fixing what breaks and replacing what you must), can improve the efficiency and effectiveness of IT. Studies by Forrester, for example, have shown that ITSM increases productivity, increases service quality, and helps control costs.⁴

There can be little doubt that information technology—in all its facets, from back-office database and server operations to laptop computers to mobile apps—drives twenty-first century organizations of all kinds, from retail storefronts to educational institutions to manufacturing. Improving the reliability, capacity, and efficiency of these technologies is an integral part of organizational strategy, planning, and operations. Having a service desk that serves as the interface between the organization's needs and all the services required to fulfill those needs seems to be a "no brainer." If, however, your organization—no matter what kind—is operating efficiently and effectively (at least according to its leaders), why change?

No one could argue that business conditions haven't changed in recent years, especially since the economic "downturn." Coupled with the increased pace of globalization, the influx of mobile devices and apps, the trend toward BYOx (device, service, technology...), the ready availability of XaaS (software, platform, infrastructure...), and the cloud, the dependencies and complexities are enormous. Last year, ticket volumes increased in 66 percent of support centers, and the most frequently cited reasons were changes in the number of customers, the number of applications, changes in infrastructure, and the scope of services offered.⁵

The business and IT have changed. The way the latter supports and enables the former is changing, too. Consumerization has had broad and deep effects on the way information technology and other services are delivered. The penetration of tablets and smartphones into the enterprise is undeniable, and IT departments—especially support—have been struggling to keep up with the pace of change.⁶ At the same time, customers and users of IT services continue to demand high levels of customer service. Firefighting and *ad hoc* approaches to service support are no longer good enough (if they ever were).

⁴ Gains in this area are modest, but still evident. See Courtney Bartlett, with Eveline Oehrlich and Michelle Mai, "The State and Direction of Service Management: Progression, Deceleration, or Stagnation," Forrester Research (April 14, 2014), <http://www.forrester.com/The+State+And+Direction+Of+Service+Management+Progression+Deceleration+Or+Stagnation/fulltext/-/E-RES106921>; Glenn O'Donnell, with Eveline Oehrlich, Stephen Mann, John Rakowski, Jean-Pierre Garbani, Doug Washburn, and Elizabeth Langer, "The State and Direction of IT Service Management: 2012 to 2013," Forrester Research (April 24, 2013), <http://www.forrester.com/The+State+And+Direction+Of+IT+Service+Management+2012+To+2013/fulltext/-/E-RES86722>.

⁵ Jenny Rains, *2013 HDI Support Center Practices & Salary Report* (HDI, 2013), p. 22, <http://www.thinkhdi.com/topics/research/support-center-reports.aspx>.

⁶ Jenny Rains, "Mobile Support and BYOD: Where Are We Now?," HDI Research Brief (November 2013), http://www.thinkhdi.com/-/media/HDI/Corp/Files/Research-Corner/RC_MobileDeviceSupport_Nov2013.pdf.

HOW BIG IS YOUR UMBRELLA?

How Do We Move From Help Desk to Service Desk?

The move from an incident-focused help desk to a strategic service desk is a business decision, not simply a question of buying and installing a tool. It requires business thinking, with a focus on how the investments required will improve business processes and generate a return on investment (ROI).

Good service management begins with a focus on processes:

- How do we do things now, and how will we do them in the future?
- Can good service management streamline or consolidate processes that are time-consuming, labor-intensive, error-prone, and/or largely manual?
- Which processes should the organization concentrate on first?
- Who will manage the organizational change that will be required?
- How will the culture of the organization affect the required changes, whether positively or negatively?
- How much will the organization spend on the required changes?
- How, and how soon, will the investment be recouped?
- How many processes will need to be supported in the service desk tool?⁷

All of these questions (and more) should be answered before you even begin contemplating the technology phase.

Based on the answers to those questions, identify or develop requirements and then draft a request for proposal (RFP) that reflects all elements of change. You will need:

- Senior management sponsorship and/or buy-in, to cut across silos and business units
- Business sponsors
- Change management plans to affect cultural change
- A project plan and manager
- A marketing plan and a communications plan
- Plans for role transitions
- Needs assessments for training (service desk and end users)

Defining the Role of the Service Desk

One of the main characteristics of a service desk is that it is intended to be a single point of contact (SPOC). All incidents, service requests, and customer communications should pass through the service desk, which is well equipped to deal with them because of its connections to all the aspects of service management, including incident management, request management, configuration management, access management, service catalog, change and release management, and knowledge management, including self-service options.

In other words, the service desk sits at the center of a hub of information, and its technology enables service desk staff to field and deal with the totality of an organization's service management environment

⁷ Some organizations think they need to maximize the number of processes supported in a tool, only to find out later that they weren't using many of the tool's capabilities.

HOW BIG IS YOUR UMBRELLA?

and be much more proactive than a help desk. The service desk solution software itself, while invaluable, is not the only factor that determines the success of the service desk. An organized, well-laid plan is at least as important.

Service desks, enabled by remote support tools and collaboration tools, are increasingly absorbing duties that used to require deskside support. More than half (52%) of support centers say that remote support tools are required to provide successful end-user support.⁸

The Top Ten Technologies Required to Provide Successful End-User Support (Survey respondents were asked to select up to five options.)



Percent of support organizations

In addition to these responsibilities, some service desks are expanding their purview by becoming the point of contact for HR, facilities/maintenance, and other business units that have customer contact and service needs. Since the service desk is business-focused and strategic, it's well worth considering whether these or related options would be advantageous for your organization.

⁸ Jenny Rains, 2013 HDI Support Center Practices & Salary Report (HDI, 2013), p. 33, <http://www.thinkhdi.com/topics/research/support-center-reports.aspx>.

HOW BIG IS YOUR UMBRELLA?

It's a Journey, Not a Destination

Even if you've been going in this direction for some time, your service management journey is only beginning. Continual service improvement is built into the concept of service management, and all your processes should be reviewed on a regular basis to make sure you're doing the right things—and doing them right. From the way you handle incident management to the metrics you collect and report, everything deserves continued attention and updating. Whatever method you use for improvement—Kaizen, for example—should be applied to all aspects of the service desk (or the help desk, for that matter).⁹

Conclusions

Although the names are often used interchangeably, there are substantial differences between help desks and service desks. The former supports end users, while the latter is a strategic component of service management. If you choose to make the move from help desk to a service desk, it's important to have a solid plan and to make sure that your goals are aligned with your organization's strategies. Plan for every aspect of the task, including organizational change and training needs. Have a high-level sponsor and solid management support. Remember that the tool itself will not guarantee success, but the way you use the tool could very well be a significant factor.

In short, make sure your umbrella is as big as you need it to be—for today *and* tomorrow.

⁹ "Kaizen," Wikipedia (last modified April 22, 2014), <http://en.wikipedia.org/wiki/Kaizen>.

HOW BIG IS YOUR UMBRELLA?



About the Author

Roy Atkinson is HDI's senior writer/analyst. He is the chief writer for white papers and *SupportWorld* articles, as well as a key in-house subject matter expert. Roy has an extensive background as a practitioner in IT support and customer service. He served as technical lead for an award-winning enterprise software implementation, and as project manager for many others. Roy is a former member of the Apple Consultants Network. He is a frequent speaker and writer on social support, customer service excellence, and mobile device support, and he serves on the HDI International Certification Standards Committee.

About HDI

HDI is the professional association and certification body for the technical service and support industry. Facilitating collaboration and networking, HDI hosts acclaimed conferences and events, produces renowned publications and research, and certifies and trains thousands of professionals each year. HDI also connects solution providers with practitioners through industry partnerships and marketing services.

Guided by an international panel of industry experts and practitioners, HDI serves a community of more than 120,000 technical service and support professionals and is the premier resource for best practices and emerging trends.

About GoToAssist

GoToAssist is a cloud-based, integrated support toolset that offers a “triple play” combination of easy-to-use service desk management, market-leading remote support, and IT monitoring. With easy access to key support functions from one interface, GoToAssist enables IT to maintain uptimes for people and devices while delivering superior support experiences. To learn more about GoToAssist, or request a free trial, visit www.GoToAssist.com.