YOUR
Top 5 Challenges,
ADDRESSED

HDI TOOLKIT
Your Top 5 Challenges, Addressed

This toolkit is intended to help service and support leaders address the top five challenges identified by respondents to HDI's most recent community engagement survey, providing a brief discussion about each challenge and suggesting potential solutions.

In 2017, the top five challenges for support centers were:

1. Managing increased workload with existing staff ("doing more with less")
2. Implementing new technologies
3. Successfully implementing knowledge management
4. Hiring, training, and recruiting staff needed to succeed
5. Increasing analyst/technician productivity and/or efficiency

PART 1
Managing Increased Workload with Existing Staff

Each year when we conduct our industry-leading Practices & Salary Survey, we ask respondents to tell us whether their organizations have seen an increase or a decrease in total ticket volume. And each year, more than half the respondent support centers say they've seen an increase in volume. The top reasons?

1. Increased number of customers
2. New applications and systems
3. New equipment/devices
4. Number of devices
5. Number of applications

In other words, the total realm of technology that the support organization is expected to support increases year over year, but—at least according to the challenges identified by service and support leaders last year—staff does not increase proportionately.

Since the amount of work the support organization has to do is largely a function of ticket volume and handle time, in order to accommodate more tickets with the same number of staff, handle time must decrease.

Here are three approaches to decreasing handle time:

1. **Introduce chat as a support channel:** One skilled analyst can handle several chats simultaneously, thus decreasing the dedicated amount of time for each. Instead of handling five contacts consecutively at 8 minutes each, the analyst might be able to handle three at once in, say, 18 minutes, and then the other two at once over 15 minutes. The total time that the analyst would be directly engaged, would be reduced from 40 minutes (5x8) to 33

Part 1

Managing Increased Workload with Existing Staff

minutes. Before plunging into chat as a channel, you should **consider several factors**, including what your customers think of chat, the problems you want chat to solve, and whether you have the right skills on your team to support chat.

2. **Clearly document what is Level 1 Solvable:** While it's better to provide solutions quickly and efficiently at Level 1, it's counterproductive to have Level 1 analysts attempt to provide solutions that they don't have the requisite knowledge, authority, or access to resolve. Issues that can't be resolved at Level 1 should be immediately escalated so that the customer isn't kept waiting. The list of L1 Solvable issues should be frequently reviewed, so that appropriate solutions can be added to the list.

3. **Optimize knowledge —** Using **Knowledge-Centered Service** (KCS) as an approach can get shared knowledge into use faster and make verified solutions available more rapidly. When knowledge is findable and current, handle time goes down.

PART 2
Implementing
New Technologies

Let's assume that you've already gone through all the steps necessary to purchase—or subscribe to—the new technology your organization needs or desires. You've done your research and due diligence, created the RFP (request for proposal), chosen your shortlist, picked the winner, and signed the check. Now it's time to put the technology to work.

Generally speaking, it's simple enough to get the right technology components installed and get them doing the right things. It's on the *people* side of the equation that we seem to run into problems. Moving from one way of doing things to another entails unavoidable, often difficult or uncomfortable, change.

Here are a few of the reasons you might run into trouble during an implementation:

- **You bought the wrong version of the product:** You thought that features X, Y, and Z were included in the version you bought, but they're not. You paid what you thought you would pay, but didn't get what you thought you would get.

- **You bought the product, but not the training:** Now you have to count on the vendor's documentation to get you through some complex installation and deployment steps. This delays deployment and consumes staff time.

Part 2

Implementing New Technologies

- **You're trying to use technology to solve a(n) _____ problem:** Fill in the blank with anything *other than* technology, such as *HR, management, sales,* and so forth. This becomes clear as you start implementation and fail to get the expected results. This is an *expectations* problem, not an implementation problem.

To decrease the difficulty of implementing new technology:

- **Get leadership support, sponsorship, and buy-in:** Implementations don't go *technically* wrong as often as they go *organizationally* wrong. It's not just about the technology, it's about how *people use the technology.* Organizational change management needs to be driven from the highest levels. Additionally, technology implementations generally require the work of cross-functional teams, so management that is able to cross the boundaries is indispensable.

- **Involve the support center/service desk/desktop support in the process from the beginning:** In **2016 research**, HDI discovered that in three-quarters of organizations, support teams were only notified when software was operationalized, but that metrics improved almost across the board when support was included in the process from the requirements-gathering phase onward. The support center and desktop support know the customers and users—and their technology—better than anyone else.

PART 3
Successfully Implementing Knowledge Management

Knowledge management is critical for any enterprise or institution, and it's not limited to the support organization. An organization that doesn't "know what it knows" is vulnerable to rework, duplication of effort, and unnecessary expense (both time and money). You won't have to reinvent the wheel if you know that you have the proverbial wheels and documented how they were invented in the first place.

Knowledge management presents several challenges, among which are:

- **Overcoming resistance to use:** Analysts can feel demeaned when they're told to use knowledge articles, thinking "We know how to do this." They may also feel that documenting their solutions is "extra work" when they're under pressure to be more productive, or that documenting their work means they're putting themselves out of a job because "anyone will be able to do it."

- **Tool confusion/mismatch:** ITSM software suites often come with at least some knowledge base functionality built in, but that functionality may not work with the way knowledge is being managed, or has been managed, in the organization. Buying a dedicated knowledge management tool requires yet another round of RFPs, expenditures, and implementation.

- **Project mentality:** Knowledge management isn't "finished" when the knowledge base is built. It's not a project; it's an ongoing process.

Part 3

Successfully Implementing Knowledge Management

Knowledge management is the result of careful planning, effort, and training. In order to implement a useful and complete knowledge management program, your organization needs to:

- **Decide on a methodology:** How will knowledge be gathered, stored, shared, and maintained?

- **Choose a platform:** Many organizations use SharePoint or a wiki to record knowledge. No matter what you choose, it must be:

  - **Accessible:** Everyone who needs access to the knowledge base must be able to access it.

  - **Configurable:** Because you may want to make some knowledge accessible to your customers and keep some knowledge internal, your platform needs to have controls you can adjust and change over time.

  - **Searchable:** Excellent search is the basis for usable knowledge. Anyone using the knowledge must be able to find what they are looking for.

- **Build a knowledge team:** Your team should include designated and/or dedicated knowledge managers, contributors, and editors or engineers.

- **Choose relevant metrics:** You'll want to track specific metrics to evaluate the success of knowledge management. The number of articles an analyst contributes isn't the most important factor in successful knowledge management; it's how the articles are used, reused, and updated that matters.

*HDI **teaches** and strongly recommends the proven KCS methodology to capture, structure, reuse, and improve knowledge. KCS is tool-agnostic, although some tools tend to work better with KCS than others. **KCS works well with ITIL**, the most widely-used service management framework in the world. See the **case studies on ThinkHDI.com** for information on how KCS can transform the way support and business get done.*

PART 4
Hiring, Training, and Recruiting the Staff Needed to Succeed

Some of the challenges to finding and hiring qualified staff are:

- **Geographical:** Perhaps your organization is in an area where there is stiff competition for service and support workers, or one in which there is a limited pool of workers.

- **A shortage of qualified candidates:** You may have difficulty getting qualified candidates to apply, regardless of the geographical considerations.

A shortage of qualified candidates is often less about the job than it is about whether qualified candidates who will accept the jobs at the level of pay and benefits offered by your organization. To attract and retain staff members, you need to offer competitive compensation and benefits, including training. But it isn't all about salary, or even bonuses. Other considerations for attracting qualified staff include:

- Paid time off
- Health insurance
- Retirement benefits
- Flexible work hours

Another factor in the ability to recruit and hire qualified candidates is their ability to learn, grow, and advance. Of course, higher levels such as management have fewer opportunities, but if there is no attempt at providing a career path, candidates will see your vacancy as a "dead-end job" and continue to look for a position. A shift-left strategy can help. As more complex and advanced work is brought closer to the frontline and to the customer, the skills and breadth of knowledge required of Level 1 analysts must increase. If provision is made to "skill up" the frontline, there will be ample opportunity to learn and grow.

PART 5
Increasing Analyst/Technician Productivity and/or Efficiency

Low productivity or efficiency might, at first glance, seem like a motivation issue, but businesses have learned again and again that it's very difficult to motivate people who can't or won't motivate themselves. Of course, there are other "people factors" involved in maintaining or increasing productivity, such as:

- Leading by example
- Recognizing and rewarding good performance
- Setting attainable goals

All too often, however, the root causes of decreased productivity and inefficiency are overlooked. They include:

- **Too many tools required to do the job:** Having to open five, six, or more screens to complete relatively simple tasks can increase errors, slow down work, and produce frustration. Tools required for the job should be as simple and as integrated as possible.

- **Insufficient training:** "On the job" training is good *if* the trainers are skilled at conveying information, and if the documentation provided is adequate and appropriate. **Seventy-eight percent of organizations** use on-the-job training for frontline staff. Trainers should be prepared, equipped, and monitored so that analysts and technicians get information delivered consistently and adequately.

- **Troubled team relationships:** Year after year, relationships within the team are cited as one of the top factors in staff satisfaction (or dissatisfaction). **Getting teams working together effectively** benefits everyone involved, and creates an atmosphere conducive to more productive and more efficient work.

Look at *all* the factors that contribute to efficiency and productivity, and don't put the burden solely on managers and supervisors to motivate staff.