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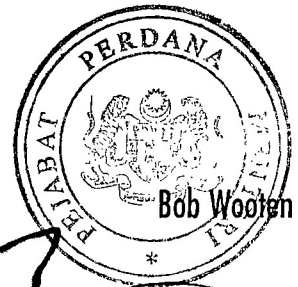
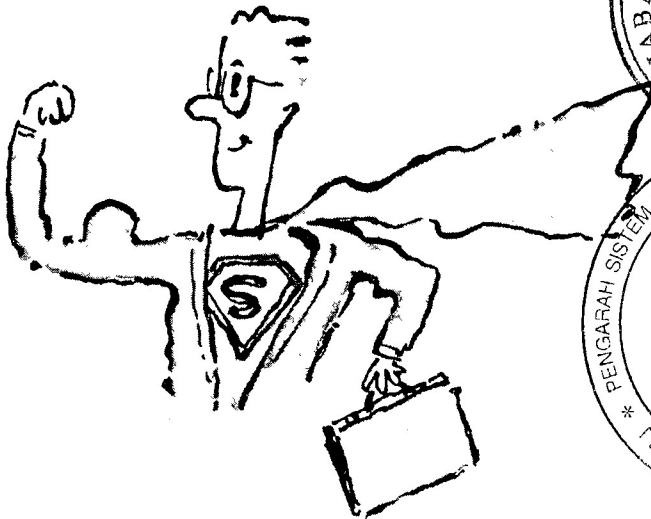
**HAK MILIK SMPKE, PEJABAT PERDANA
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TARIKH BELI: 15 NOV. 2002

Building & Managing A World Class IT Help Desk/Bobwooten/MC Graw Hill/007213217X	RM122.50
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1234567890 CUS CUS 01987654321

ISBN 0-07-213237-x

Publisher Brandon A. Nordin
Vice President & Associate Publisher Scott Rogers
Acquisitions Editor Steven Elliot
Project Editor Madhu Prasher
Acquisitions Coordinator Alex Corona
Technical Editor Rod Sharp
Copy Editor Carolyn Welch
Proofreader Paul Tyler
Indexer Valerie Robbins
Computer Designers Tara Davis
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Series Design Peter F. Hancik
Cover Design Greg Scott
Cover Illustration Stephen Quinlan

This book was composed with Corel VENTURA™ Publisher.

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Acknowledgments

Without a doubt, this book could not have started, let alone been completed, without the absolute support of my wife, Donna. She provided the inspiration to write it and the love to finish it. As I sat behind a computer screen over many months, she raised and cared for our two small children, Max and Elizabeth. She never complained and always supported me and for that I will be forever grateful.

Brantlee Lemmink is a wonderful person with many great ideas for the proper creation of a Help Desk. She began her career as a Help Desk agent for me and is now in a new organization responsible for building and running her own world class Help Desk. Her time, effort, and input were invaluable.

I also want to thank all those at Osborne/McGraw-Hill who helped me complete the book. From Steve Elliot to Alex Corona to Madhu Prasher to Carolyn Welch and everyone else behind the scenes, these superb professionals offered guidance and editorial advice that turned my collection of ideas into this extremely effective book on Help Desks. Rod Sharp was also very instrumental in providing me with ideas and the experience to fine-tune my thoughts throughout the book.

Last, I want to thank all the associates and customers I have had the pleasure to work with over the years. They have given me a wide variety of experiences from which to draw upon for this book. Who would have known that those episodes of complaints, constructive criticisms, and indeed some appreciation could have shaped a book like this one? Thanks specifically to Tom, Jess, Paul, and MK for their help over the years.

Preface

Help Desks are the face of the IT department. They are typically the first and longest lasting impression a computer user receives. Because of this, it is crucial that they receive the attention and resources to efficiently and effectively operate and serve the customer. Until recently, Help Desks did not exist in many organizations and those that did were mostly by-products. Today, Help Desks are widely recognized and established. I encourage you to make the most of your Help Desk. Allowing it or requiring it to be only reactive is a waste of resources. The people on the front line can see things happening that others cannot see. Using these people wisely will make the organization and you more successful.

This book was written primarily from an internal customer, computer user perspective. The acts of customer service, however, transcend organization charts and mission statements. Whether you use a computer or need help with a broken refrigerator,

contacting someone else for help can be frustrating. Finding the person who recognizes your needs, has the ability to help you, and carries through with it, brings a sense of satisfaction despite bad beginnings. Your company can stand out from the others by continuing to be the one who wins over others in need of help. This applies to customers who pay you for the service or not. It applies to customers who work in the same company as you do or to those who only use your services or products.

If you are new to the Help Desk area, I welcome you. You will soon see that this is a world of challenges but they all can be overcome by using the items discussed in this book. If you are a veteran of the Help Desk's wars, congratulations. I urge you to push the group to new places. Many of the items covered here are examples of new places that are outside of everyday Help Desks. They can be natural extensions and have been successful in places I have been.

To both the new and old, I wish the best of luck to you!

Introduction

For fourteen years, I have worked in, designed, built, staffed, trained, read about, and been trained on Help Desks. It was my first career in the Information Systems industry and will always be my pride and joy. I have seen many people describe aspects of Help Desks and while all have very good points, I have never seen one that described the Help Desk adequately from start to finish.

So one night I set out to write this book to talk about the Help Desk world from the idea stage through to its existence as a must-have in the organization. It begins with a section on defining a Help Desk and the reasons businesses have created them. Assuming that the reasons apply to your organization, the book starts with the list necessary to actually open up shop. With the Help Desk up and running, the next section is on sustaining operations and overcoming common pitfalls of Help Desks. It takes a brief detour for those who already have a Help Desk but do not like it so it talks about how to turn around a failing Help Desk. Finally, the book shows you larger uses of a Help Desk that are proactive and that contribute mightily to the corporate climate.

This book is not technical in nature but conversational. I tried for an experienced, common sense approach versus formulaic, scientific methodology. The book is designed for those who do not even know what a Help Desk is as well as for a company that already has a Help Desk. It is for CIOs, IS department heads, business managers, or entry level IS associates who are looking for a way to make a name for themselves in the organization. Most of all, it is for those who recognize the importance of customer service in the IT world.

You will note that I spend more time presenting options than I do dictating exactly what you should do. That is completely on purpose. Believe me when I say I have some specific preferences. Because there are so many ways to set up Help Desks and incorporate them into the business, I think it is far more valuable to give you choices that allow you to customize your operation instead of dictating exact ways of operating.

To give you a heads up on what to expect, there is a “What to Look For” section at the beginning of each chapter. This section lists major topics the chapter will cover. At the end of each chapter is a “Quick Recap” section. This section asks you high-level questions that serve as a review of the chapter. It is intended to make you think about how the information in the chapter could apply to your unique situation.

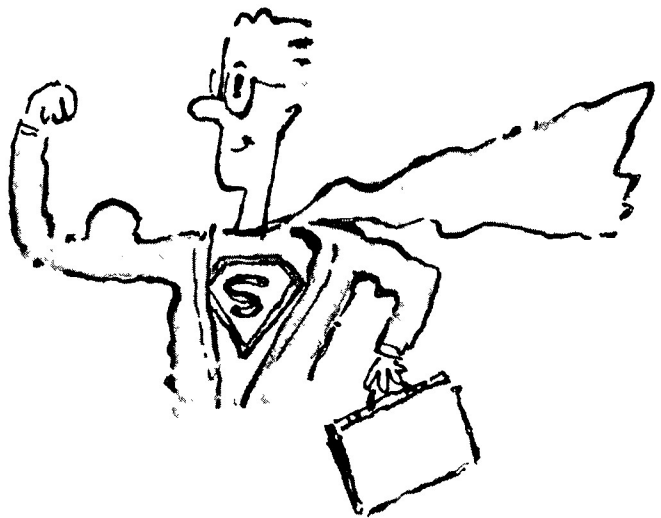
Following each major part, there is a checklist of items to help ensure you are moving in the right direction. This is a good place to make sure you understood the ideas presented in that part and how you can use them in your Help Desk.

About the Author

Bob Wooten is Vice President of Consulting Services for a nationwide IT services firm. Prior to that, he was manager of information technology services and operations at a national wholesale distributor with more than 9,000 employees. He has more than 14 years experience in the IT field, and directs a staff in such varied capacities as systems and database administration, networking, applications development, asset management, telecommunications services, and Help Desk staffing and training.

PART I

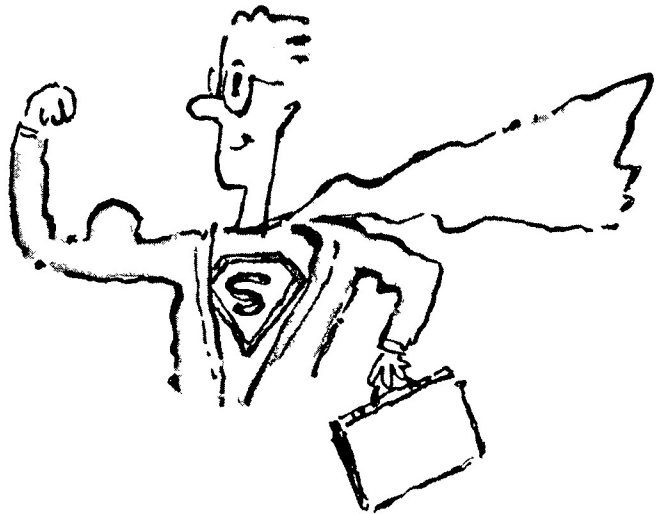
What Is a Help Desk and Why Would I Want One?





CHAPTER 1

Help Desk Concepts



The business world today is changing and the importance of technology is increasing rapidly within that world. Technology has become a crucial element in the success of a business and, in many cases, how technology is used can make or break a company. Whether it is telephones, fax machines, PCs, or the Internet, technology continues to evolve. It's getting cheaper, faster, smaller, and easier to use. To get cheaper, faster, smaller, and easier, the components that make up this technology are getting more and more complicated. These technological advances make our lives simpler and more productive, and corporations will gain mightily from these technologies as they can conduct business more profitably and efficiently.

The one constant in the use of technology in the business world is the need for someone to keep it up and running. Help Desks are that constant. A Help Desk of some type is needed for the basics like phones or word processing packages, or for complicated things like Enterprise Resource Planning (ERP) packages and global networks linked by the Internet. Beyond keeping the actual hardware and software available, users need to know how to use this technology. Better yet, users should be able to concentrate on their jobs and not have to think about the tools they're using. For example, I am not worried about how the keyboard is attached to my PC right now; I am more interested in getting my thoughts and experience into this book. A world class Help Desk lets you focus on your job at hand without caring about the technology you're using.

The IT world can be a confusing place to outsiders because of its terms and acronyms. I sometimes wonder if it's on purpose to keep people thinking that the IT world is special and unique. To help overcome some of the confusion surrounding these terms, this chapter will explain some of them and how they are used. Other concepts will be addressed as they relate to the chapter they come up in. So hang on.

What to Look For

- The definition of a Help Desk as it fits in any organization
- The different connotations of Help Desk names, and the people who work on a Help Desk, the people outside the Help Desk who need its services and support, and how they reach it to resolve problems
- The important distinction between a call, an incident, and a problem

Defining a Help Desk

For purposes of this book, we will define a Help Desk as *a formal organization that provides support functions to users of the company's product, services, or technology*. Let's break this statement down and analyze it phrase by phrase.

A formal organization that... Support can be a full-time job or part of someone's job; for example, a programmer may also take phone calls with questions on the software he or she is coding. But a Help Desk is an organized effort with an expressed purpose. A Help Desk can be staffed by one person wearing many hats or by literally thousands of people supporting scores of functions in the business.

...provides support functions... This can be reactive, as in "I sit by the phone and wait for someone to call," or proactive, looking for ways to make users more productive and effective in their jobs. Support can be break/fix, as in "my printer jammed," training, as in "the correct way to enter a purchase order on the system is...," or behind the scenes administration, as in "keeping the network up all day every day."

...to users of the company's products, services, or technology. The users (or customers, to sound friendlier) are the ones calling or are in need of the services you provide. The products, services, and technology are the point of the need. It may be a product your company manufactures, a PC, printer, software, or telephone.

Help Desks are not as well known as applications development, database administration, or network management. You cannot get a college degree majoring in Help Desk; for that matter, I have never even seen a college class on the topic. I worked for years in a Help Desk before I could get my mom to understand what I did. Granted, I didn't mind that she told her friends, "My son runs the computer department," for lack of a better explanation!

What you see is the recognition of the Help Desk profession. The Bureau of Labor estimates there are over 450,000 Help Desk professionals now employed. The Help Desk Institute feels this number is closer to 560,000, which will double in the next ten years. College majors may not exist for a Help Desk career, but certifications and professional organizations are popping up all over. It is even fair to say that if you consider yourself a quality IT shop that will expand into the electronic commerce arena, you are behind the times if you don't have a formal Help Desk in place. You are behind because service, for customers or technology, has taken over electronic commerce and those businesses that cannot deliver quality customer service will not succeed in the long term.

Understanding Several Help Desk Names and Terms

I will use many terms interchangeably throughout this book, not to confuse you but because they have become so mixed together in their use today. While some have distinct differences, some do not. There is a glossary for a long list of terms related to a Help Desk, but following are some I use quite often.

Help Desk, Support Center, and User Support

I started above, and will use throughout, the name *Help Desk* to describe the person(s) or group that functions to support your department and company. Personally, I dislike the term because it's old-fashioned and doesn't give the credit a well-oiled department deserves, but it is the most popular. Once I was in a position to name the group, I used the term *Support Center*. Even this name is supportive or reactive but it's a bit more fashionable than Help Desk. (It did draw many comments towards *Sports Center*, however, which is not necessarily a bad thing.) We then decided to go to Customer Services and finally to Technical Customer Service. Other terms I have seen are Support Services, User Support, Technical Support, Competency Center, IS Support, Customer Care, and on and on. Mix in the words Support, Help, Customer, User, Technical, and Service and somewhere you will get a good name!

Associates, Agents, and Employees

For a long time, if you worked in a company you were considered an *employee*. Lately, I have seen a trend away from that term towards the more favorably regarded *associate*. It's supposed to sound more like you are a part of the big picture and not just a person employed by an impersonal corporation. You won't see the word *employee* here but you will see *associate* and *agent* mixed throughout. I distinguish between the two by using *associate* when I am writing about a person's career and personable traits and *agent* when I am referring to his or her role within the Help Desk itself. If this is confusing, you can go with the assumption that the two are interchangeable.

Customers, Users, and Callers

I will use a mixture of these terms when referring to the people outside the Help Desk who need your services or help. The term *customers* denotes a group of people who need extra care and should make you feel more inclined to help them with their problems. *Users* might be an accurate term because they *use* your product, but it does not promote the "I care for you" feelings a Help Desk agent should have. *Callers* may call you on the phone, but they could just as well walk up to your desk, e-mail you a question, or fill in a Web page. The point is they need you. Again, these terms will be used interchangeably throughout the book.

Calls, Incidents, and Problems

What could be the difference between these terms? For routine conversations, there really isn't any. It is more important to distinguish between them when we speak of measurements and call management packages. The book will take some time to distinguish between them when it specifically matters.

A *call* is any contact from a customer to the Help Desk. It is not limited to telephone conversations, but includes e-mail, faxes, Internet chat, voice mail, and walk-up traffic. An *incident* is a driver of the call. Incidents are the occasion that makes the caller recognize the situation. A *problem* is the root cause of all this mess. Recognizing the distinction between these terms can really affect the outcomes of measurements and call tracking. You can see this distinction in Figure 1-1.

Let's walk through an example. You stroll into work one morning and walk past two of the associates in the IT department. They're on the phone and making notes frantically. As soon as they put the phone down, it rings again. You whisper to one of them asking what is wrong. She replies that there are PC hardware problems. It seems that some of the PCs in the building are experiencing slowness. Walking over to the other associate, you ask the same thing. He replies that he is working on some software issues. Microsoft Office keeps hanging up on people. Although it seems odd to get this many calls so early in the morning, the associates seem to have it under control, so you head to your office to begin your own day.

All is not under control, however. Left completely in this state, the root problem will not be resolved and eventually the whole building, including you, will have its computing service come to a halt. Why? Because the IT associates are not working on the *problem*, which is a faulty server, instead they are answering phone *calls* and working on the corresponding *incidents*.

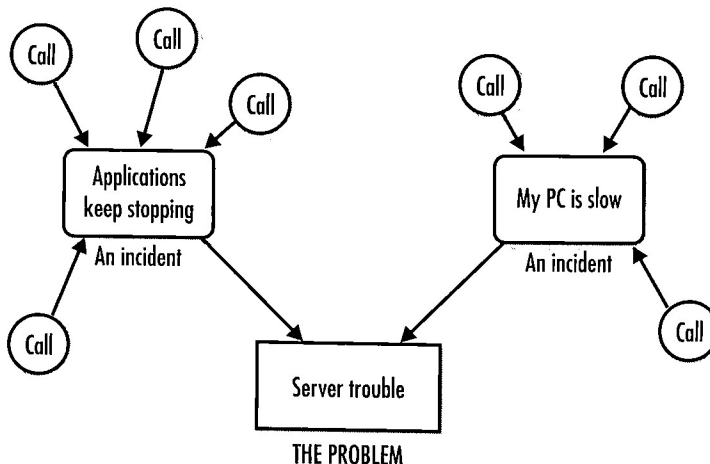


Figure 1.1 Calls, incidents, and problems

The *calls* are each phone ringing, the guy waiting by the agents' desk to try and reach them, and the voice mails stacking up. The call is the contact by the customer into the Help Desk. A call is not technical; it happens every day in businesses across the world. In our example, the customers would tell you the problem is what they called in and that is correct...from their view. From the view of a Help Desk, the problem may lie elsewhere.

The *incidents* are what the two IT associates have narrowed down their calls to—PC slowness and software hanging up. It is good they were able to focus their efforts on these two incidents, but they are not done.

They are not done because the *problem* has not been reached yet. Eventually someone will discover that the incidents are related and are the result of a faulty server in the computer room. Until that problem is fixed, the calls will keep coming and more incidents will be found.

This scenario really points out many topics for building and managing a Help Desk. We will cover all of them throughout the book, but it's good to recognize now. Whether it's a central place to call, training agents to resolve problems, having a manager discover that multiple calls are related, or communicating out to customers that a problem exists and is being worked on, the Help Desk brings enormous value to any organization that uses technology.

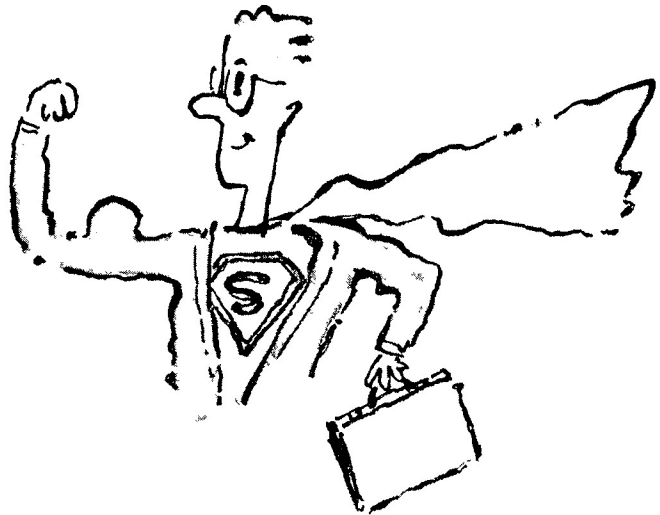
Calls, incidents, and problems. Which are you measuring and which are you working on? I will go into more depth on this in the measurement chapter and when I discuss call management packages. You can see from here that just talking about calls or problems can have several different connotations. This example is typical of problem resolution in Help Desk incidents.

Quick Recap

- How does this description of a Help Desk fit your desire to build or run one? Will yours be formal and managed as the definition intends?
- Have you picked a name for your Help Desk yet? The book will go over the need for this later, but there is no reason not to start thinking about it now.
- Do you care about the differences between customers and users? Will it make a difference in your company for the people who need the Help Desk's services to be referred to in a particular manner?
- Do you understand the distinction between calls, incidents, and problems? If not, re-read that section because as it will play a big part in future chapters. Remember that calls are each contact into the Help Desk, incidents are what prompted that particular call, and problems are the root reasons that started it all.

CHAPTER 2

Why Do I Want One?



Companies create their own formal Help Desk for a variety of reasons. The key word is *formal*. Help Desk functions exist in all companies and at all levels. Looking over at the person next to you and asking whom to call for an insurance question could be a function. Stopping a person in the hallway to figure out how to make the copy machine staple can be a function. Pulling out a manual (does anyone really do this?) to develop a whiz-bang spreadsheet fulfills the function of a Help Desk. You must have some inkling as to its need since you are reading this book. This chapter will go over some of the common reasons for a Help Desk's existence in an organization.

What to Look For

- There are many reasons to create a Help Desk. The value it will bring to your organization can be seen through increased effectiveness in your associates, your processes, and your customers' satisfaction. Many of these reasons will be discussed in detail in this chapter.
- A Help Desk will allow your associates to perform the job they were hired to do. They can use the Help Desk to resolve computing issues so they can remain free to continue their own job responsibilities.
- A Help Desk also creates a central repository of knowledge for the company as a whole. Instead of pockets of knowledge being spread out across many of your associates, this knowledge can be accumulated in the Help Desk for easy referral and transfer.
- A Help Desk can also provide a centralized database of technical experience to help multiple groups do their jobs better. Help Desk agents can access this database for their work, or for anyone in the company who needs the Help Desk's services and support.
- You may be looking into building a Help Desk because the current environment does not give you the level of services you need. Your computing services are critical to your business and if you cannot get the help you need, you will have to come up with new ideas to get it from somewhere else.
- A Help Desk is the first impression many people get of the IT department and the company. Establishing a professional group devoted to providing technical customer service can leave lasting, positive impressions on your customer base.

Reasons to Create Your Own Help Desk

There are seven primary reasons a company goes to a formal Help Desk. We will look at each one individually for more details. A Help Desk does the following:

- Lets associates perform the jobs they were hired to do
- Provides synergies from a central organization handling computer-related issues
- Creates a physically centralized repository of knowledge
- Provides help when current computer help methods are not meeting expectations
- Provides customers or users their first contact into the IT department
- Bridges the technology gap between end users and “super technical” associates
- Helps keep technology use consistent and aligned

Allows Other Associates to Perform Their Own Jobs

All companies need their associates to do the jobs they were hired to do, not fixing the tools they use for the jobs themselves. Paying high salaries for programmers to reset passwords is not very effective. Conversely, having administrative assistants answer business rules questions within your software may not be wise for the business either. These local support providers, the associates whom others go to with computer problems, are typically not experts and provide answers based more on their own experience rather than on formal training. “I don’t know why but it worked for me last time,” is a phrase used often when local associates support their peers. Even when correct, their answers are short term in nature and may not align with the long-range technology plans of the organization. It’s when the “fix” is not correct that more problems are created. What works on one PC may very easily mess up something when it’s performed on a different PC. Before too long, companies will have multiple people discussing a problem and their experience with it and none of the associates will be performing their own jobs.

Provides Synergies from a Central Organization Handling Computer Problems

Another good reason for a Help Desk is the synergy you get from its centralized focus towards resolving computer problems and issues. *Central* here does not necessarily mean physical. Help Desks can span multiple sites; it is how the Help Desk is organized that I am referring to.

It can be very costly for a company with many locations to train its associates in every facet of the business. Total Cost of Ownership is a popular phrase that speaks to reviewing all costs involved in ownership, specifically beyond the acquisition price. Gaining efficiencies by pooling resources to solve problems helps reduce this cost of ownership and gives you a higher return on your investment. Help Desk agents can be involved in the technology or software development stages so they can have a thorough understanding of the behind-the-scenes of a product. The ability for the Help Desk agent to understand the inner workings of the technology is vital to supporting it effectively. Conversely, the users of the technology will usually only receive training after it is released. The users have the advantage of using the technology in their work every day, but the Help Desk can at least know “why” the technology works like it does.

Creates a Physically Centralized Repository of Knowledge

A strong advantage a formal Help Desk offers a company is its knowledge. The Help Desk agents are constantly in touch with the customers and quickly gain valuable insights into how things are going in the field. A Help Desk, even if staffed in multiple locations, can store its knowledge in a centralized database. This database lets Help Desk agents access prior problems and solutions to quickly resolve problems that occur over and over. This database can be as simple as a file folder, an Excel spreadsheet, or a full-blown call management package. Call management packages will be discussed in great detail later. For now, just consider them as software that allows agents to enter calls in an efficient manner.

This physical repository helps resolve both the easy and the hard problems. For the easy ones, a review of the database can give good feedback to trainers on topics to teach the users. By educating users on simple resolutions to problems, you can empower customers to better help themselves. For the harder problems, the database can show trends that help systems administrators and programmers resolve the root cause or design new programs with a similar focus.

Current Computer Help Methods Are Not Meeting Expectations

It may be that you currently use Help Desk services from an organization and they are not meeting your expectations or are too costly. Bringing that functionality in-house can sometimes reduce the costs and/or give you a better understanding of what your business needs as it moves forward with technology.

For example, the business may have contracted with its software supplier for their support group. At another time, they contracted with a hardware reseller to provide support for the various types of hardware deployed. Each of these contracts

should have included specific details on service levels and escalation procedures. That looked good on paper at the time and the business felt like they were covered.

Over time, the different business units began noticing a decrease in call resolution times and felt they were not being taken care of. The legal group reviewed the contract but found the service providers were performing just within the requirements of the contract. Maybe the business had shifted priorities since the contract signing and the terms were no longer adequate. If the service provider could not expand its services to meet the business needs, a change would have to be made. One option is for the company to bring all or most of that support in-house, and build its own Help Desk.

Provides First Contact into the IT Department

Your customers' first and ongoing contact with the IT department will primarily be through the Help Desk. You want that contact to be professional, efficient, and effective, and devoting part of your organization to it is a superb way to achieve this. The Help Desk will be staffed with associates dedicated to providing customer service in a technical world. Their focus is entirely on this goal and results in higher levels of satisfaction among your customers.

This applies even to a smaller IT organization. An example could be a five-person shop. One person manages the group, three more are programmers, and one is a technical engineer. They're always either in meetings or deep into projects for the business. What do users do when they have a problem? Call IT? In this group, the phone may go unanswered for a while until someone returns from a meeting or lunch. At other times, the programmers are behind closed doors concentrating on producing high quality code within the time frame allowed them. Being interrupted throughout the day by users is counterproductive to their programming mission. This attitude might spill over into the conversations with the caller and produce unneeded antagonism between the parties. Now the business has unhappy customers with problems and longer lead times on its programming efforts. In this example, you can see why the Help Desk should be a strategic part of your plans and not a by-product of the services you offer.

Bridges the Technology Gap Between End Users and "Super Technical" Associates

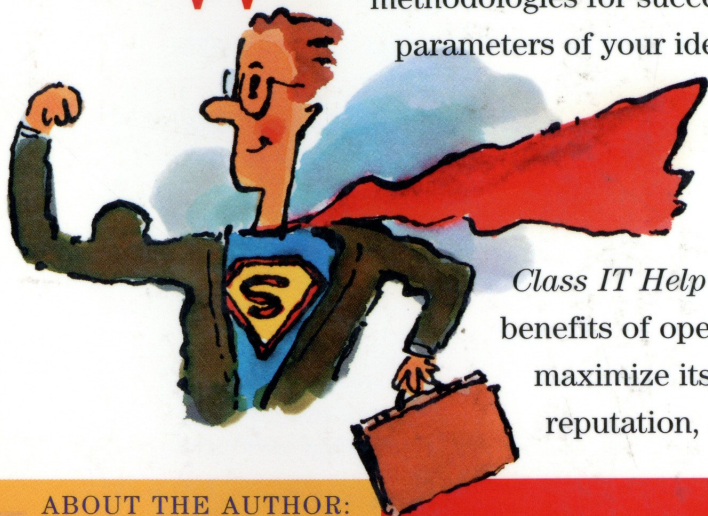
Help Desks allow a focused entry point for customers to interface with the IT department. Help Desks also allow this interface to be as "customer-friendly" as possible. Super technical people, computer geeks, are not known as extroverted, people-friendly people. This is a broad generalization, but it typically holds true over a large population. When customers need help and can only explain their

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ABOUT THE AUTHOR:

Bob Wooten is Vice President of Consulting Services for a nationwide IT services firm. Prior to that, he was manager of information technology services and operations at a national wholesale distributor with more than 9,000 employees. He has more than 14 years experience in the IT field, and directs a staff in such varied capacities as systems and database administration, networking, applications development, asset management, telecommunications services, and Help Desk staffing and training.

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- Examine the process of defining, documenting, and building your ideal Help Desk
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