

Within many companies the help desk and desktop support team work independent of each other, contributing to inefficiencies, lower customer satisfaction and higher support costs. A methodical approach to narrow the gap between the two groups is needed to create a unified approach that will increase end user satisfaction and lower the total cost of providing these services

In many IT service and support environments, the help desk is managed independently from the desktop support operations, contributing to inefficiencies in the provision of support services. While each group spends time and energy in attempting to make their respective teams better through people, process and technology, they nonetheless operate independently from each other.

However, their independence is fraught with problems, including unresolved help desk incidents that increase costs as they are escalated to desktop support. Integrating both groups will create a more efficient, seamless operation, saving the organization time, energy and money.

A Common Theme

Consider the following common threads within the IT service and support environment:

- Help desks and desktop support teams are typically managed independent of one another.
- Performance metrics and key performance indicators (KPIs) are generally not aligned between the two groups.
- Help desks do not typically resolve all of the contacts they could and should.
- Some help desks do not retain ownership of escalated calls, and off-load the responsibility to others.
- Desktop support receives incidents that should be resolved elsewhere.
- There is a higher cost associated with dispatching a technician to support a desktop than resolving the issue at the help desk.
- Inconsistencies and lack of control in the support environment greatly contribute to end-user dissatisfaction.
- Minimal cross-training occurs between the two groups.
- Many companies consider the desktop support technician as a pathway for career development for the help desk analyst.

Compounding the Problem

Even though they will generally report to the same leadership, many help desks and desktop support teams work independently, making it difficult to get both teams striving toward a common strategy and vision. As each manager identifies their performance metrics and KPIs, they guide their respective groups to meet or exceed KPIs established specifically for their team. Each manager is so focused on achieving performance metrics within their own team they typically are unconcerned about how it affects another group.

In a March 2007 study, The Aberdeen Group indicated that 85% of respondents stated that being able to resolve contacts in the help desk was extremely important to their company's financial performance. However, due to many factors, such as individual skill level, experience and time constraints, many help desks do not resolve all of the calls they could and should on first contact. HDI's 2006 Practices and Salary Survey indicated that almost half of the respondents resolved 60% or less of incidents on the first contact.

Consequently, many calls are escalated to the desktop support team unnecessarily. With the average cost for dispatching a service technician at \$230, these escalations contribute to higher costs than necessary for support. Additionally, some desktop support technicians are somewhat offended by this escalation practice as it not only creates additional workload, but they also feel it is beneath their skill level to resolve these type of calls.

Whether escalated or not, ownership of each contact needs to be established. The help desk does not always retain ownership from beginning to end of all contacts that it receives - so when incidents are escalated throughout the organization, no centralized group is overseeing what happens and whether a timely resolution occurs. Consequently, "lost" requests are increased while end users become frustrated when no communication is made as to the status of their call.

People Issues

Due to the distinct line of demarcation between the two groups, cross-training opportunities are frequently missed by both teams – such as improving technical skills in the help desk and customer service skills in the desktop support team. These skills, when acquired, can assist in the development of career paths for the team members.

However, due to the absence of a career path, some help desk analysts feel like they are in a "dead-end" position, contributing to a higher turnover in the position than necessary. As a result, the help desk analyst:

- Finds their enthusiasm regarding the job diminish over time
- Discovers that their technical skills are not always aligned properly with the position
- Feels they are not being challenged enough for career growth
- Burns out from repetitive activities

The gap between the help desk and desktop support poses challenges to any support organization. They will contribute to the polarization of the support organization, causing two independent groups "hoping" they are seeking a common goal. Unfortunately, this is a recipe for disaster.

Process of Integration

So how can you effectively integrate the help desk and desktop support teams to complement each other, and gain efficiencies in the operations within the IT service and support environment?

It's not as easy as combining the two groups. You will need to develop a strategy and search for ways to make these two groups complement each other over time. The end result of this effort will guarantee you an increase in customer satisfaction, improved morale within the support team and lower support costs.

- **Develop a Vision Statement**

Begin the process by creating synergies between the two teams, even if they continue to be managed as two independent teams. Develop items such as a unified approach to goal achievement or a common vision statement. Throughout this process, you will need to demonstrate to each team, and upper management, how each can benefit through this unified approach.

- **Incident Analysis**

Another way to effectively integrate the teams is to perform a thorough analysis on the incidents that are escalated from the help desk to desktop support. This will require a single point of data (SPOD), as coined by HDI's Dr. Jim, the Service Doctor. Without this SPOD, effective problem management becomes very difficult to perform in the operating environment.

This allows more thorough data analysis, and will help you determine what actions may be taken to help increase resolutions and minimize escalations. This one activity alone will help provide you with many opportunities to decrease the separation between the teams.

- **Contact Ownership and Management**

Now that you have a SPOD, you will need to ensure there is consistency and control of the data. This will greatly improve your knowledge management, status updates, analysis and reporting. To gain this consistency and control, it is imperative to establish ownership of the data for the operating environment.

One aspect in establishing this ownership is by implementing an end-to-end contact management program within the help desk. Contact ownership assures that one group, typically the help desk, retains ownership of the contacts that are received for support. They also develop the call flow of the contact process, keeping in mind that the amount of outgoing calls will undoubtedly increase as call closures, statuses and follow-up are provided to the end-user community on each contact.

Examine your KPIs

Next on the list to accomplish will be to take a closer look at the KPIs that are used in each group, and consider taking a different approach with them. Try to stay out of the trap to follow the norm, and think about changing your approach to help support your efforts in bringing the teams closer together.

For example, instead of looking at just first-call resolution for the help desk, consider the effect the front-line team has on the elimination and minimization of escalations and, ultimately, the amount of calls that are dispatched as they move to another group. Once these KPIs and performance metrics are more closely aligned, continue the process and calculate how much cost was avoided by the implementation of each activity.

Cross Training

Another item that is sure to rise to the top of the list is the opportunity for cross-training between the two groups. Once you have determined what technical skills are lacking in the help desk, you can set up opportunities for desktop support technicians to provide that training. Within the desktop support team, the technicians can be taught additional “soft” skills and customer service traits by the help desk analysts to assist them over time.

To help fortify the cross-training, you may want to search for additional ways to tie together performance metrics such as first-call resolution in the help desk, and incidents resolved over the phone (IRP) by the desktop support team. As the teams cross-train and build rapport, track how FCR increases and IRP decreases.

Cross-training will help contribute the following:

- As the help desk analyst gains the skills and experience from the cross-training, they will provide a much higher quality of service, resolving more contacts on the initial attempt and contribute greatly to an increase in customer satisfaction ratings as the end users gain more confidence in the abilities of the support team.
- With more calls being resolved at level one, the desktop support technician can be involved in more challenging activity. This will allow the IT organization to effectively utilize their resources on projects that need completion.
- With more incidents being resolved at the help desk, the necessity to dispatch a technician will diminish, thereby avoiding the higher cost of dispatching a technician to the end user’s desktop.

The morale, attitude and enthusiasm of both teams will greatly improve as the help desk takes on additional responsibilities and the technicians can focus on more challenging activity.

Value of Integration

As the help desk and desktop support teams create a more unified approach, a tremendous amount of value will result to the support organization and to the company. This includes:

- A unified support approach will demonstrate to the end user community that support is critical for their success, instilling more confidence and increasing the satisfaction level within the end-user community.
- Focusing on performance metrics and KPIs will increase the pro-activeness within the support teams, thereby creating an environment that focuses its energies on returning end users to productivity quicker.
- An end-to-end contact management program will provide the support teams with consistency and control in the operating environment, and will go a long way in minimizing end users frustration with enhanced communication, status updates and timely resolution.
- Building and maintaining a single point of data will provide the support teams with the power of information, which can be used to enhance communications between the teams and to end users, increase the skill level of personnel, and for self-service and self-help opportunities.

- Each member of both teams will now have a career-path established and documented in their personnel file. This will improve the outlook and attitude of each team member, and will add the commitment level needed for the support team to deliver a high quality of services to the end-user community.

Conclusion

There are many similarities within the service and support environment between the help desk and desktop support teams. Although it is not an easy task to bring these two groups closer together, it's crucial to the successful operation of any support environment. A step-by-step action plan will begin to alleviate inefficiencies, raise the team members' skill level, and improve morale. Most importantly, moving toward an integrated support team will improve customer satisfaction and lower the total cost of ownership to deliver support services.

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