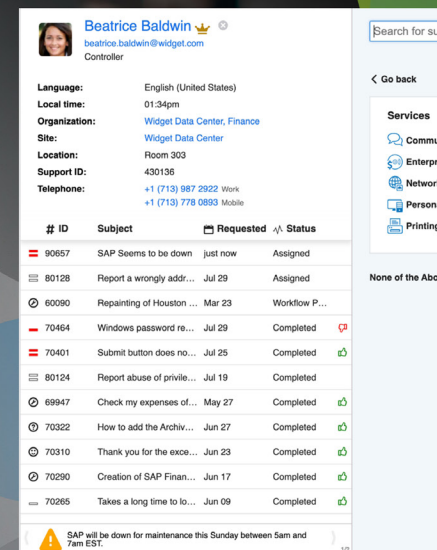


# Rethinking the Service Desk

## 9 Practical Improvements to Increase Efficiency



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## Introduction

This whitepaper covers nine improvements you could make to your service management application to further empower and improve your service desk. The service desk has a major influence on customer satisfaction and how the service organization is perceived. So they clearly deserve the best functionality we can offer them.

Although the screenshots show 4me, the principles in this paper apply to every (customizable) service management application.

## 1. Use CTI

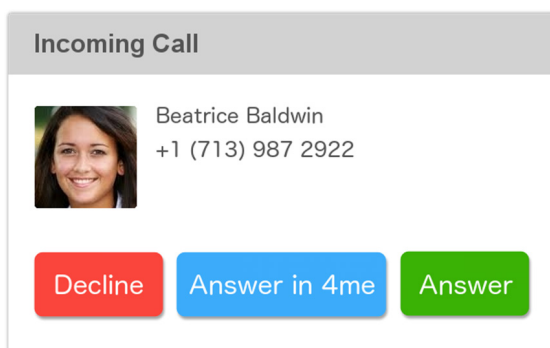
The acronym CTI stands for Computer Telephony Integration. The main goal of CTI is to identify the caller based on a unique identifier, most often the phone number used for calling the service desk. The help desk employee does not need to make any additional effort to find the requester in the service management application, saving a lot of time and avoiding mistakes.

All modern telephony systems support some form of CTI and so should modern service management tools.

Ideally, the integration is able to find the right caller in the service management solution regardless of whether they call from their work, mobile or home number. As long as the number is registered in the service management solution, CTI should be able to match incoming calls with a caller.

Another slightly more advanced CTI feature that may be useful for service desks that support external customers is the ability to deal with people who have specified the same telephone number in their contact details. When a number is used by multiple people (e.g. the switchboard number of their organization), these people should be offered as possible callers when a call is received from that number.

The CTI number matching logic can also be a point of attention. When an exact match of the full number of an incoming call is needed, it is likely that a large percentage of numbers will not result in a match. That is because the country code or area code may not be included when the telephone number is registered in the service management tool.



## 2. Select the Caller Instead of Opening a New Request

The next question is, what should happen when the service management application has identified the requester based on the phone number? Most tools that support CTI immediately show an empty request/incident form with the requester already filled in. We would rather show a screen with a collection of much more useful information.

Let's look at all the information we have available in a single screen:

The screenshot displays a service desk interface for a caller named Beatrice Baldwin. The interface is divided into several sections:

- Caller Information:**
  - Name:** Beatrice Baldwin (with a crown icon indicating VIP status)
  - Email:** beatrice.baldwin@widget.com
  - Job Title:** Controller
  - Language:** English (United States)
  - Local time:** 01:34pm
  - Organization:** Widget Data Center, Finance
  - Site:** Widget Data Center
  - Location:** Room 303
  - Support ID:** 430136
  - Telephone:** +1 (713) 987 2922 (Work), +1 (713) 778 0893 (Mobile)
- Request List:** A table with columns: #, ID, Subject, Requested, and Status.
 

#	ID	Subject	Requested	Status
90657	SAP Seems to be down	just now	Assigned	
80128	Report a wrongly addr...	Jul 29	Assigned	
60090	Repainting of Houston ...	Mar 23	Workflow P...	
70464	Windows password re...	Jul 29	Completed	
70401	Submit button does no...	Jul 25	Completed	
80124	Report abuse of privile...	Jul 19	Completed	
69947	Check my expenses of...	May 27	Completed	
70322	How to add the Archiv...	Jun 27	Completed	
70310	Thank you for the exce...	Jun 23	Completed	
70290	Creation of SAP Finan...	Jun 17	Completed	
70265	Takes a long time to lo...	Jun 09	Completed	
- Services:** A list of services including Communication, Enterprise Applications, Network Connectivity, Personal Computing, and Printing. A red dot next to 'Finance (SAP)' indicates it is unavailable.
- Notification:** A banner at the bottom states: "SAP will be down for maintenance this Sunday between 5am and 7am EST."

- We see a list of currently open and recently completed requests. It is very likely that she is calling about one of these existing requests; When this is the case, one click on the relevant request allows to service desk analyst to read and update the request;
- The thumbs up/down icons behind some of the completed requests indicate her satisfaction with the way those requests were handled. This can also help anticipate her sentiment;
- The lower left corner displays a broadcast about SAP not being available this Sunday. This information is displayed because Beatrice is a user of the SAP service, which makes this information relevant to her. If the service desk agent passes this information on to the caller, this caller will be left with a favorable impression of the professionalism of the support organization;
- The crown icon in front of her name indicates that the support organization considers Beatrice to be a VIP, meaning she should be assisted with extra care;
- On the right-hand side of the screen, we see a filtered list of services. Not all supported services are listed, though. Only the services for which Beatrice is covered by an SLA are shown as those are the ones that could be relevant for this call. Clicking on one of these services will open a list of standard requests and knowledge articles related to the service. These can be used to more quickly complete the registration of a new request for the caller;
- The red dot in front of the Finance (SAP) service alerts the service desk agent that the SAP service is currently unavailable. This is important information, as this is likely the reason why Beatrice called the service desk;
- On the far right, we see a list of all configuration items for which the caller can contact the service desk for support. Clicking on one of these assets will open a list of standard requests and knowledge articles related to this type of asset.

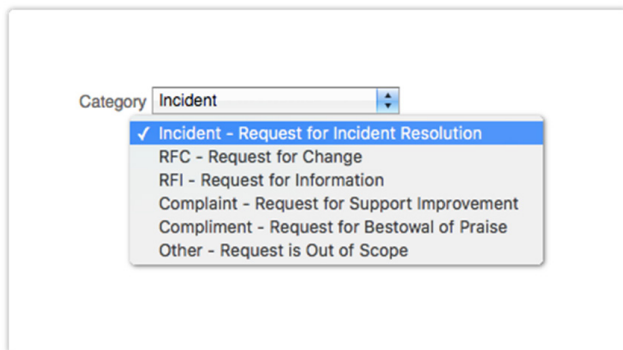
- We see the requester's name, job function, and organization/department. A controller likely works with an ERP system like SAP;
- The language field in the info section indicates that US English is Beatrice's preferred language, so we know how to greet her;
- We see her contact details, so we know how to reach her in case the call is dropped unexpectedly;
- We see the current time in her time zone, information that we can use to assess her sentiment. People calling way before or after work hours are likely to be more agitated;

It is evident that this information allows the service desk employee to have a much more informed conversation with the caller. If it turns out that we should register a new request, the service desk analyst can do this with a few clicks.

### 3. Use the Same Form for Incidents and Service Requests

Many service management applications use different record types and/or forms for registering incidents and service requests. It is difficult to decide upfront which form should be used when a new call comes into the service desk. What may have initially sounded like an incident might very well turn out to be a service request and vice versa. In such cases, the record in progress will need to be deleted and a new record needs to be created, a waste of time with a high possibility of losing important details and context. This unnecessary distinction also greatly increases the complexity of integrations with other service management tools, as it essentially doubles the integration effort and complexity.

A better solution would be to consider everything submitted by or for a customer a request. A simple categorization can then be used to further specify the type of request. This field can then easily be updated when more is learned about the request.



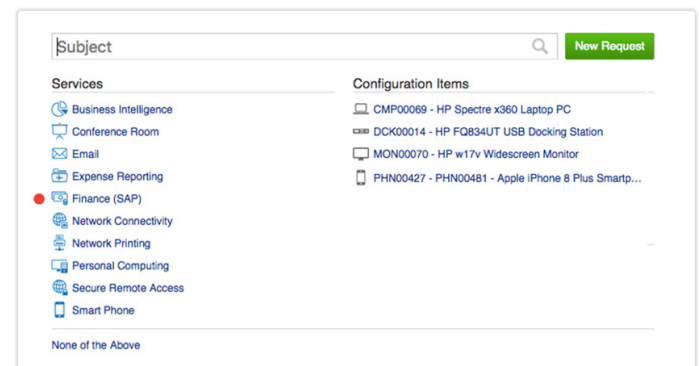
Category: Incident

- ✓ Incident - Request for Incident Resolution
- RFC - Request for Change
- RFI - Request for Information
- Complaint - Request for Support Improvement
- Compliment - Request for Bestowal of Praise
- Other - Request is Out of Scope

### 4. Talk Services, Not Tech

Traditionally, service management applications require service desk analysts to link a request to a category or subject. This category often represents the technology or the technical component the request is related to. This is problematic for multiple reasons. The first problem is that, in most cases, it is not immediately obvious to which component a request might be related. This is typically what you discover during the resolution of the request and do not know upfront. The second problem is that the requester is not familiar with or aware of these technical details. It immediately creates a misunderstanding of what exactly the request is about.

Services create a common understanding and terminology that both parties understand and can relate to. The term service has been around for centuries; high time to fully embrace and use it. Services should be the umbrella we use for grouping and organizing all data in our service management application.



Subject

New Request

Services	Configuration Items
Business Intelligence	CMP00069 - HP Spectre x360 Laptop PC
Conference Room	DCK00014 - HP FQ834UT USB Docking Station
Email	MON00070 - HP w17v Widescreen Monitor
Expense Reporting	PHN00427 - PHN00481 - Apple iPhone 8 Plus Smartp...
Finance (SAP)	
Network Connectivity	
Network Printing	
Personal Computing	
Secure Remote Access	
Smart Phone	

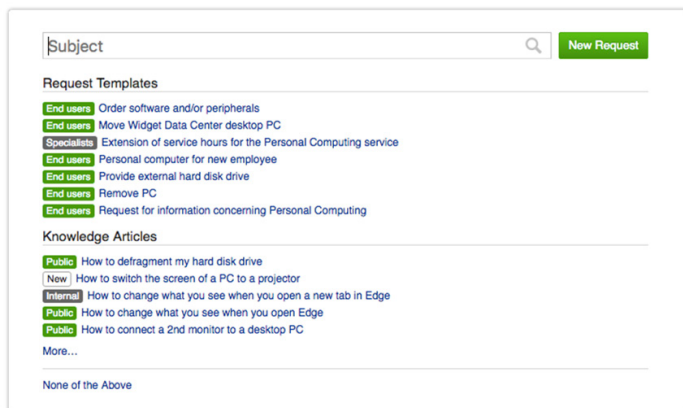
None of the Above



## 5. Allow Everyone to Create and Improve Knowledge

In many organizations, knowledge articles are created and maintained by a select group of people. Content is carefully crafted and goes through a stringent review process before it becomes available to others. Unfortunately, this discourages people from creating knowledge. Even when they do, this traditional approach leads to content not being available in time, especially in fast-paced environments like IT.

The Knowledge-Centered Service (KCS) methodology has taught us that knowledge management should be a collective process: everyone participates in creating and improving knowledge. As soon as a request is resolved, the solution should immediately be available in a knowledge article. This also ensures that knowledge content is completely demand-driven: the specialists only work on



The screenshot shows a service desk interface. At the top is a search bar labeled 'Subject' with a magnifying glass icon and a green 'New Request' button. Below the search bar are two sections: 'Request Templates' and 'Knowledge Articles'. The 'Request Templates' section lists several items with status indicators: 'End users' for 'Order software and/or peripherals', 'Move Widget Data Center desktop PC', 'Personal computer for new employee', 'Remove PC', and 'Request for information concerning Personal Computing'; and 'Specialists' for 'Extension of service hours for the Personal Computing service'. The 'Knowledge Articles' section lists items with status indicators: 'Public' for 'How to defragment my hard disk drive', 'New' for 'How to switch the screen of a PC to a projector', 'Internal' for 'How to change what you see when you open a new tab in Edge', 'Public' for 'How to change what you see when you open Edge', and 'Public' for 'How to connect a 2nd monitor to a desktop PC'. A 'More...' link is at the bottom of the knowledge articles section. At the very bottom, there is a link that says 'None of the Above'.

knowledge for which an actual demand exists.

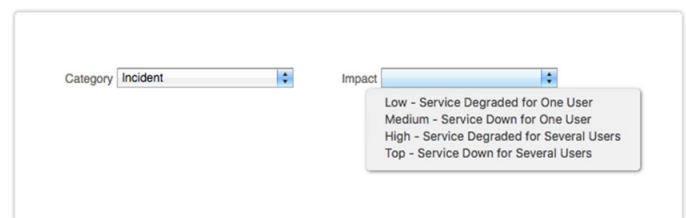
Searching for knowledge should be implicit; the application should not expect support specialists to search for knowledge that can help them resolve requests. Instead, service management solutions should offer up knowledge proactively, using the information in the request.

## 6. Determine Priority Based on Impact Levels Only

A long time ago, the ITIL books told us that the priority of an Incident should be based on a combination of the impact and the urgency of the Incident. Service management applications adopted this principle and included complex calculation matrices to come up with the correct prioritization, based on the selected urgency and impact. The biggest issue with these matrices is their level of subjectivity and ambiguity, especially the urgency of an incident. After all, who decides how urgent an incident actually is? If we leave it up to the requester, everything is urgent. The service desk analyst doesn't want to be caught in the middle between the requester and the service level manager and therefore always selects 'medium'.

4me has put a lot of effort into defining objective levels of impact. These levels are based on the level of (un)availability and the number of people affected by the issue. The level of impact will lead to certain targets for picking up, responding to, and resolving the request. These targets are defined in the SLA by which the requester is covered for the affected service.

Once the correct service has been selected for someone's request, the service management application automatically applies the correct SLA. This simple approach then ensures that the service desk analyst only needs to select the impact level to allow the correct SLA targets to be calculated. These calculated targets will, of course, be more stringent for business-critical services than those for less important services.



The screenshot shows a service desk interface with two dropdown menus. The first menu is labeled 'Category' and has 'Incident' selected. The second menu is labeled 'Impact' and has a dropdown arrow. A tooltip is visible next to the 'Impact' menu, listing five options: 'Low - Service Degraded for One User', 'Medium - Service Down for One User', 'High - Service Degraded for Several Users', and 'Top - Service Down for Several Users'.

In some cases, there is a business reason requiring a request to be completed sooner than its SLA resolution target. To accommodate this, the service management application should make it possible to manually mark a request as 'urgent'. This should then cause the request to appear at the top of the assignee's to-do list without affecting the calculated SLA target. After all, the service provider should not be penalized for attempting to complete a request quicker than agreed in the SLA.

## 7. Set Targets That the Service Desk Has Control Over

The service desk is a special kind of support team and requires some specific metrics to measure its performance. Make sure that these metrics are not affected by the actions of other teams, only by the service desk. One of the frequently used metrics is 'rejected solutions'. This metric tracks the percentage of requests registered by the service desk and reopened by the requester after completion. It should only include requests that were resolved by the service desk without any involvement of other teams. So if another team provided, or helped to provide, the solution, the request should not be included in the calculation of the rejected solutions for the service desk.

### These are the KPIs that are most relevant to the service desk:

- Pickups within target: the percentage of requests for which the pickup was performed within the set target. A pickup is the equivalent of response time but tailored specifically to the responsibilities of the service desk. The pickup time is calculated as the time between the assignment of the request to the service desk team and one of these events:
  - The request is assigned to a specific member of the service desk team;
  - The request is forwarded to a different team;
  - The request is set to a status other than 'assigned';
- First call resolutions: the percentage of requests immediately completed during registration;
- Service desk only resolutions: the percentage of requests completed by the service desk team without assigning the request to another team;
- Service desk resolutions: the percentage of requests completed by the service desk team;
- Rejected Solutions: the percentage of requests reopened by or on behalf of the requester after being registered and completed by the service desk team.

Be sure to set targets for each of these metrics and emphasize only the 1 or 2 that are currently the most important to improve. Once the performance is satisfactory, start emphasizing additional metrics.

**First line support agreement for Widget International**

Status: Active  
Customer: Widget Data Center  
Customer representative: Howard Tanner  
First line support provider: VirtualSupport, Ltd.  
Service desk team: Service Desk  
Service desk manager: Khunal Shrestha  
Start date: Mon, May 07, 2018 Mumbai  
Support hours: 24x7 (Monday through Sunday) Mumbai

**▼ Targets**

Pickup target: < 0:15 hours:minutes  
Pickups within target: >= 80%  
First call resolutions: >= 40%  
Service desk only resolutions: >= 50%  
Service desk resolutions: >= 60%  
Rejected solutions: < 10%

## 8. Make It Easy for Requesters to Submit Feedback

Customer satisfaction could easily be the most important metric, but it is also one of the more difficult ones to measure. Providing feedback requires additional effort and most customers shift their focus back to their daily activities as soon as their request has been completed.

To increase the likelihood of receiving feedback, the service management application should provide a mechanism that is unobtrusive and requires little effort from the requester.



A good solution is to include two simple icons in the notification email that is sent to the requester as soon as the request is completed: a 'thumbs up' and a 'thumbs down' icon. When the requester clicks one of these icons, their response is registered in the service management application. The same buttons can also be used in the request when viewed in the self-service portal or the mobile app.

If a requester clicks the 'thumbs down' icon, they are taken to a form in the self-service portal and asked to provide a short explanation for their dissatisfaction. The form also contains an option for reopening the request.

This method is a good tradeoff between requiring too much additional time and effort from the requester and ensuring we get useful feedback.

Request #	Category	Impact	Status	Reason: Workaround
70401	Incident	Top	Completed	Feb 26

This request has been completed for you.  
Are you satisfied with the manner in which your request has been handled?

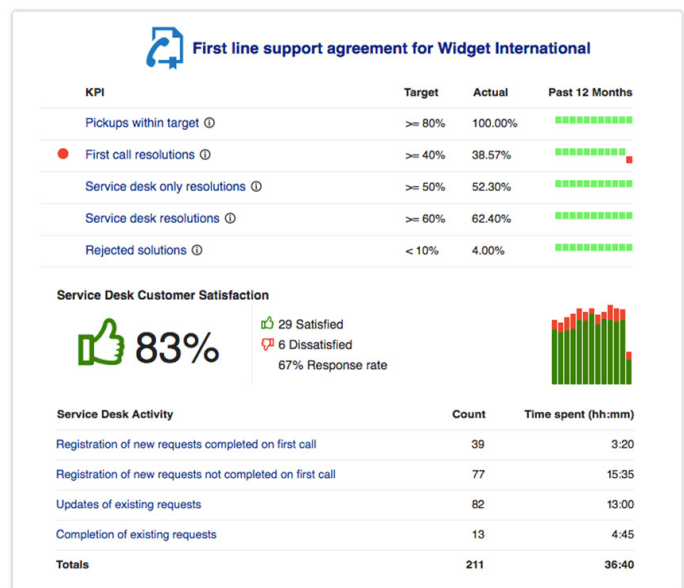
**Submit button does not work**

Requested by: Beatrice Baldwin Feb 25  
Service instance: Expense Reporting Production Widget Data Center  
Configuration items: Widget Expense Reporting 12.4.2

## 9. Measure and Report

The previous two paragraphs provided recommendations on how to measure service desk performance and customer satisfaction. It is vital that the service management application offers reports or dashboards which show these metrics and their historical trends.

The KPIs that were not met in the current month should be highlighted. A drill-down for each metric makes it easy for the service desk manager to further investigate what caused the violation.

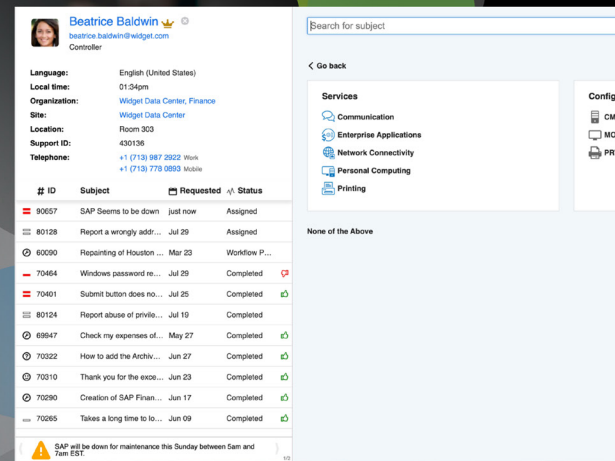


## Conclusion

This white paper provided detailed recommendations on functionality that can dramatically increase the efficiency and quality of your service desk team. Depending on your specific service management tool, some recommendations can be difficult or even impossible to implement. Focus on the quick wins; improvements that can be implemented without too much effort or impact.

In some aspects, your service desk team is a support team like any other. On the other hand, this team has some responsibilities that require specific functionality, metrics and reporting.

Make sure that the tool your service desk works in all day empowers them to excel. It will make their work more fulfilling, which reduces churn, and your customers will notice the difference.



### The **Complete** Service Management Platform

4me® combines ITSM with ESM and SIAM capabilities, enabling all internal departments, such as IT, HR, and Facilities, as well as external managed service providers, to work seamlessly with each other. At the same time, 4me provides complete visibility and control of service cost and quality.