The Evolved Help Desk

What Every Midmarket CIO Needs to Know About Implementing a Service Management Approach

By Jason Holmberg, Senior Product Manager, FrontRange Solutions

Introduction

The traditional help desk is ill prepared to keep pace with ever-evolving business demands and challenges posed by an expanding regulatory climate. In this harried environment, midmarket CIOs need to manage the dual tasks of delivering business value and strategic services that satisfy their users.

The initial steps to enable the necessary transformation are already underway. The help desk, once seen as a necessary evil, has been recast as a service desk with a best-practices mindset. The next key milestone is further evolution of the service desk to service management, so that IT becomes more relevant to the organization and directly aligned to the challenges facing the CEO.

The help desk is often seen as the face of the IT organization, so any drop-in credibility can bring negative consequences to IT's future, including tighter budgets, longer approval cycles and a reluctance to involve IT in driving business change. However, IT professionals and executive management can *help* the help desk evolve to meet their business needs and to overhaul negative opinions.

This article discusses benefits of evolving the help desk and provides tips for success during the transition to a service management approach.

Benefits of a Service Management Solution

Service management solutions enhance and extend the traditional help desk model. Before the development of a service management approach, the help desk traditionally remained in "reactive mode" – Simply put, its main goal was to "keep the lights on" within the organization. If the help desk could be personified, its attitude could be conveyed from the following statement: "If I don't hear from the customer, there are no problems." In short, the help desk did *not really help* the organization or its customers.

Enter the service management solution. This new approach establishes a set of organized processes by which to manage the service desk. These organized processes go beyond just resolving the immediate IT issue. The processes can include deploying a new application from the help desk, creating an audit trail to meet Sarbanes-Oxley compliance requirements, or

providing a tool set to deliver these values. Overall, it lets the business reach the next level by delivering various processes or steps to take beyond the preliminary task at hand.

Proactively serving an organization, the service management solution assists the overall company mission. This approach is focused on determining what the customer requirements are, and in so doing, supporting each of the lines of business within the company instead of just supporting the underlying, basic technology platform.

However, it's not just the service management solution that benefits companies in transition. The vendors that build service management solutions offer a unique perspective on the market need and the ideal technology platforms that many companies don't have the time or resources to provide themselves. When purchasing from a service management solution vendor, the company benefits from an approach that instills best practices along with appropriate technology.

Selecting a Service Management Solution Provider

Once a company realizes the myriad of benefits tied to adopting a service management approach, there are two main categories of factors to consider when selecting the actual solution provider: internal (within the company) and external (outside of the company).

Internally, in the midmarket, the first key decision-making factor is budget. Help desk technicians are looking for the capabilities of an enterprise tool, but in an easy-to-use, inexpensive, reliable application. This is especially important today with concerns over a pending recession, since IT is often the first place to get hit. In essence, companies should look internally first to gauge their financial status and determine what they can afford.

Another key internal factor for success is early leadership from the CIO in making the transition to a service management solution. Certainly, the new approach will help him or her increase the value that IT brings to the organization, and the CIO will weigh in on the vendor selection. But today's CIO regularly wears multiple hats, providing expert opinions to diverse teams across a company, from business analysis to sales. A CIO's job doesn't end with the recommendation of which technology should be brought into the company; he or she will also need to "sell" the benefits to management on the broader value.

In regards to the external consideration factors, the first step is to choose a service management solution provider with an experienced, reputable track record. The overall financial viability of the vendor should be determined along with conducting other due diligence and research. Take time to do your homework – The company you choose will play a critical role in your long-term strategy, thus you want a partner with a pedigree to create a lasting and mutually beneficial relationship.

Secondly, on the external front, companies need to ensure that the provider's current capability and offerings meet today's needs, as well as expected future needs. For example, if processes change in the future, will that mean having to wait for a newer version before moving forward? This consideration addresses the range and ease of support the vendor can offer.

Key Steps to a Successful Transformation

Once the decision is made on the solution provider, orchestrating a smooth transformation to the service management approach will allow you to start the new phase of the company off on the figurative right foot. One common mistake during the process of evolving away from the help desk, however, is to do so without clearly defined requirements. Without clear requirements, a company is not in a position to decide what offerings or product versions are necessary.

After the requirements for a service management solution are established, there are best practices to follow to ensure a successful implementation. Since the solution is process-centric, companies need to determine what key performance indicators to track. The No. 1 indicator is often customer satisfaction. If customer satisfaction is low, determining why is helpful. The second step is to set goals so that metrics can be tracked, which means pulling in best practices to improve customer satisfaction and call resolution times.

Generally, when transitioning to a service desk model, the easiest and most common way to start implementation is with an incident problem management focus. This can be fine-tuned along the way. For example, companies can interview customers and get better-defined service requests and goals in place. In addition, consolidating IT, HR and other functions into one service management platform with one phone number increases the productivity of the service desk. It allows for direct routing of problems to the appropriate organization in a timely manner.

A key point to keep in mind during the entire transformation process is that it will be a continuous and gradual improvement. That said, everyone should have an understanding of when it's time to move forward to the next step.

Jason Holmberg is the senior product manager for FrontRange Solutions' (www.frontrange.com) award winning HEAT Service & Support product line. He has been a product manager for FrontRange for five years. Prior to product management, Jason was the technical lead on the service desk supporting FrontRange Solutions' GoldMine product and served in the U.S. Army as a track vehicle mechanic. Jason also focuses on the knowledge management and self-service product offerings of FrontRange.