freshservice
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Checklist for setting up Incident management

Logging an Incident

Channels

- Configure support email addresses to which employees can send emails about IT issues.
- Personalize self-service portal to resonate with your end users.
- Activate the service desk mobile app to enable users to raise tickets and agents to handle these tickets even when on the move.

Why? - Multi-channel support expands the scope of being available anytime and accessible from anywhere

User management

- Managing users' profile including agents & requesters can be done either manually or automatically using one of the following ways:
    - CSV bulk import
    - Active Directory integration
    - Third party identity provider integration
- Assign the right scope of access (global or restricted) and role (admin/supervisor/agent) to restrict visibility and access to sensitive tickets.

Why? - Having user profile information within the service desk gives a better context whenever a ticket is raised.

Classifying an Incident

Form customization

- Customize incident form template to capture the right information.
- Configure dynamic fields to cater to multiple departments.

Why? - Improves FCR, reduces back & forth interactions and identifies the right agent/group to whom the ticket should be assigned.

Auto-assignment

- Automate ticket classification & assignment based on ticket properties using workflows.
- Enable round robin ticket assignment for workload distribution.

Why? - IT Automation is an efficiency booster and eliminates redundant activities such as ticket assignment.

Prioritizing Incidents

Realistic SLA definition

- Create multiple SLA policies when more than one group is onboarded into service desk.
- Define escalation rules to address SLA violations so that agents working on the tickets get notified on/before time.

Why? - SLA impacts productivity and employee satisfaction

Priority matrix

Deciding impact (the effect an incident will have on service levels) and urgency (used to determine how soon an incident should be resolved) determine the priority of a particular ticket.

- Let end users input impact & urgency values at the time of reporting a ticket. Priority matrix definition decides the priority of a ticket based on these two values.
- Use automation capabilities to set the priority based on attributes such as issue type, requester title. For eg: If CEO of your organization raises an incident, it get the highest priority.

Why? - Assigning the right priority to tickets has a direct impact on meeting the SLA and addressing business critical issues on time.

Investigation and diagnosis

CMDB

- Associate the right CI (asset) to the ticket, which is causing the incident or being impacted. This gives a better context during incident handling.
- Use auto-discovery mechanisms to populate assets.
- Maintain asset relationships with one another so that diagnosis becomes easier.

Why? - This helps in analysing the root cause and reducing MTTR

Knowledge base

- Integrate knowledge management within incident management to prompt solution articles at the right time.
- Add visual elements such as images, videos to increase adoption of knowledge base.
- Categorise the articles under relevant folders.

Why? - Maintaining a rich repository of knowledge base articles enables agents and end users to find solutions easily for frequently occurring issues and also improves FCR.

Notifications

- Personalize email templates for sending notifications by including dynamic placeholders. Notifications for incidents include status (resolved, closed), SLA related, agent to agent interaction, assignment, new comments.
- Automate the process of sending notifications based on certain conditions.
- Configure notifications through multiple channels such as email, mobile push alerts, SMS etc.

Why? - To stay informed and take quick actions

Resolution

- Configure canned responses (templates) to send quick replies.
- Automate email notification that has to be triggered to end user once issue is ‘Resolved’.
- Configure a CSAT survey to assess customer satisfaction post resolution.
- If the issue has not been fixed permanently, associate a problem ticket to perform RCA and find a permanent fix or associate a change ticket to roll out any new patches.

Why? - Faster resolution means faster service recovery.

Closure

- Set up an automation rule to automate ticket closure process. For example: 48 hours after resolution.
- Manually close tickets after getting a confirmation from end users.
- Let employees close tickets themselves through the self-service portal.

Why? - To maintain records.