

Service Desk Institute

# 11 Ways To Effectively Streamline Your Customer Support

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In partnership with



Published August 2015



# Declaration

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# Introduction

Sadly, many companies view their IT department, and their service desk, as a cost centre rather than as a centre of IT and business innovation – with both IT budget and staffing levels under continual scrutiny and at risk of reduction. This when combined with an increased corporate demand for IT (driven by both a greater corporate reliance on IT to do business, and employee experiences in the consumer space) means that corporate IT organizations now need to simultaneously streamline and improve customer support – which is not an easy task.

Furthermore, many service desks often believe that their hands are tied as their finite resources are fully-focused on reactive support, leaving little room for innovation and improvement. Service Desk Institute (SDI) research supports this concern, showing that the greatest challenge service desk managers currently face is to deliver more with less resource.<sup>1</sup>

In SDI's experience, many under-pressure service desks find it difficult to invest time and resource into both investigating potential streamlining opportunities, and calculating the long-term return on investment (ROI) to justify the change. However, advances and innovations in both service management and communication technologies now offer service desks the opportunity to quickly and cost-effectively streamline their customer support – while still meeting the support demands, and expectations, of their stakeholders. Although there is the caveat that these opportunities can be challenging to justify and implement, if for example, ROI calculations and people change issues are not adequately addressed.

Service desks should not be disheartened though, as the growing use and validation of these new service management and communication technologies in the consumer world make it easier for their corporate adoption. Firstly for technology introduction and secondly the probability of their successful adoption by both IT staff and employees. Live chat, for instance, is a good example of a technology that is now commonly offered and used in the consumer marketplace but has so far seen limited adoption in the corporate IT service desk industry, with research conducted by the Service Desk institute indicating as little as 24% of internal IT service desks use the technology.

However, service desk professionals should not limit themselves to new technologies. There are many beneficial approaches and practices filtering into service management from other industries. For example, “Lean principles” – initially termed Toyotaism as a result of the highly successful Toyota Production System<sup>2</sup> – and their application were originally created for

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1. Troubridge, Tessa, “Public Sector Benchmarking”, SDI Members Research Library, 2014

2. Holweg, Matthias, “The Genealogy of Lean Production”, Journal of Operations Management, 2006

physical production environments. However, the service management industry has awoken to the value of Lean thinking, adapted the Lean framework to accommodate the provision of less tangible services, and uses it to deliver more streamlined services through what is termed “Lean IT.”

This report outlines a wide range of innovations, technologies, and practices that have already been tested in the consumer marketplace and are now ripe for corporate IT and service desk adoption. Once you have read the report, we hope you see that streamlining and improving customer support is not as risky, challenging, or concerning as it has previously been.

# Using Service Management Strategies

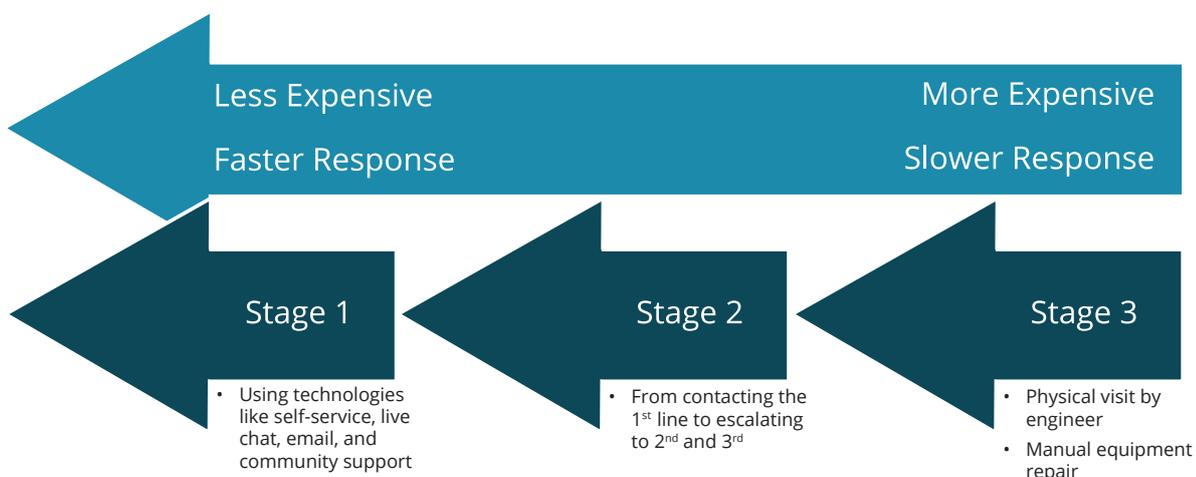
Many of the technologies and strategies discussed in this report originate from the consumer marketplace. These strategies can help to guide service desks through what may appear to be uncharted territory, and towards the end goal of streamlining support structure.

## Shift Left

Foremost on the list of streamlining approaches that service desks can benefit from is the increasingly popular “shift left”.

As a concept, “shift left” is perhaps not the most revolutionary of ideas – after all, service operations recognised the need to operate more like a business many years ago – however with this particular approach the value is in its simplicity.

The premise is straightforward – service desks can save time and money by moving their support structure as close to the customer as possible. Through shift left, service desks are able to reduce the cost of the services they deliver and more readily meet the needs of their customers. However to achieve this, all aspects of service management (including new technologies and evolving customer expectations) need to be in scope.



To help demonstrate this we can look at remote support software, a technology that has become synonymous with streamlined support and often finds itself exemplifying the shift left strategy. The technology, now ubiquitous in the IT support industry, allows service desk analysts to connect directly to customers' devices. This enables increased accuracy when troubleshooting and helps to improve first time resolution rates. In this way we can see the support structure shift to the left, as the remote connection software allows analysts to resolve issues remotely on the first line, rather than via field support, and is thus a step closer to the customer.

In reaching the most time- and cost-efficient support structure, the shift left approach also encourages the use of customer empowerment. Self-service and self-help – both of which are looked at in greater detail in this report – are prime examples of shift left in action, as both place support in the hands of the customer. Equipping customers to manage what would have otherwise been calls to the service desk through self-help. It is an effective way of meeting both consumer expectations and simultaneously reducing the support overheads of the service desk.

### **TOP TIP #1**

*Ensure performance data is used to validate the success of the shift left process. This data should include metrics such as first contact resolution, knowledge base utilisation, customer satisfaction and total call volume.*

## The Principle of Call Avoidance

This is an extension to the “shift left” approach that is quickly surfacing in the IT service desk industry. The aptly-named “call avoidance” principle instructs service desks to focus on technologies and processes that remove the need for end users to contact the service desk. At the centre of this approach is the understanding – now widely held within the industry – that telephone contact is the most time consuming and expensive communication channel for any support model.

Call avoidance support structures have been in place in the consumer marketplace for years – evolving from the growing belief that providing a live person-to-person communication channel for every contact is unrealistic and unsustainable. The result is the development of self-service and self-help capabilities and tools. In SDI’s experience, self-service is already relatively widespread in the IT service desk industry, however lessons from the consumer marketplace can still point us towards a more holistic approach, with the self-service portal being a “one-stop shop” for end users. Some IT organizations have ensured end users have every self-help capability possible – from a password reset facility to global system outage updates – to ensure that they only need to contact support when self-help cannot assist.



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This model has helped to ensure that consumer marketplace support structures have been able to meet the growing needs of increased customer volumes. As they become increasingly pressured to do more with less, service desk professionals need to take note of these consumer-space successes.

### TOP TIP #2

*A call avoidance strategy requires constant vigilance to ensure it is moving in the right direction. Ensuring the outcomes of the strategy enhance and do not detract from relationships with customers needs to be a central consideration.*

## Lean Principles

“Lean IT” originates from “Lean Manufacturing” principles<sup>3</sup>, with adaptation to make them suitable for a service, rather than a physical product environment. The central objective for Lean IT, which is a hybrid of both “Lean Manufacturing” and Lean Service, is: “the elimination of waste, where waste is work that adds no value to a product or service”<sup>4</sup> within an IT service delivery and support context.

Thus Lean IT’s focus is to maximise efficiency and the overall customer experience through the reduction of waste. From a streamlining customer support perspective, Lean IT is a framework that can offer continual improvement by increasing value, through the reduction of unnecessary or redundant practices and activities. As with many service management principles, the defining characteristic of successful adoption of the framework is through demonstrably building a culture of customer centricity and value recognition.

One of the most powerful aspects of Lean IT is the complementary philosophy of:

- **The outward aspect** – this identifies the value of the relationship between the IT organisation and the rest of the business, and the continual improvement between business processes that better cooperation would lead to.
- **The inward aspect** – this focuses on how the continual service improvement of the IT organisation leads to optimal operational excellence within IT.

The Lean IT framework also asserts that value can only be recognised from the standpoint of the customer, and that through this perspective a value chain (for common service desk activities) can be created that reveals all the steps that add value. It also offers the potential for the removal of the steps that do not. Lean IT’s ultimate goal is to move an IT organisation through stages of value recognition and waste removal until a “state of perfection is reached in which perfect value is created with no waste.”<sup>5</sup>

### TOP TIP #3

*When taking a look at services through a lean perspective, avoid a large scale project and instead focus on short, data-driven, incremental improvements.*

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3. Lean manufacturing is a business model and collection of tactical methods that emphasise eliminating non-value added activities (waste) while delivering quality products on time at lower cost with greater efficiency.

4. Selig, Gad, “Implementing Effective IT Governance and IT Management”, Van Haren, 2015

5. Selig, Gad, “Implementing Effective IT Governance and IT Management”, Van Haren, 2015

# Adding New Communication Channels

Service desk professionals – armed with the strategic insight of the previous section – should now find themselves equipped to investigate technological opportunities for efficiency and improvement. For many businesses in the consumer space, adding or changing communication channels has offered the greatest opportunity to better meet the needs of their customers alongside a welcomed reduction of support overheads. As a result, we can look at their successes and apply these, tentatively, to the IT service desk industry.

Foremost, service desk professionals need to recognise the value customers place on areas of the service – such as communication – as the aforementioned “Lean IT” principle mandates<sup>6</sup>, while also recognising the potential benefits of using technology to make communication easier. Service desks should also consider operational strategies such as moving support closer to the customer through a call avoidance programme, for example.

## Live Chat

In the consumer marketplace, chat is an established support communication channel. In fact, for many well-known companies – in particular utility companies – chat is the preferred communication channel, with other channels more difficult to find or only initiated by the support agent. As we demonstrate later, the success of chat in the consumer marketplace can be attributed to two key areas:

1. Customer popularity
2. Perceived reduction in support costs

Both of these reasons make chat a prime target for IT service desks looking to streamline support without compromising their service delivery.

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6. Lean IT asks operations to look at the value of their services through the eyes of a customer. The objective is to remove sections of the support structure that offer no value, however the same model can ensure areas of the structure that hold the most value for customers are expanded. Therefore, engaging with customers to develop an understanding of their preferred communication channels should inform the service desks development strategy.

In terms of customer popularity, consumer world-related research has shown the power of chat for customer support. For instance, a report published by eDigitalResearch in 2013 revealed that customer satisfaction with chat is “extremely high, suggesting that users are likely to return and use it again”.<sup>7</sup> In addition, customers surveyed on their preferred method of contact, with the businesses from which they purchase goods and services, rated chat the highest in terms of customer satisfaction – with the researchers concluding that “chat is likely to become a key part of the customer service journey.”<sup>8</sup>

Anecdotal evidence suggests that the popularity for end users is due to benefits such as the end user can communicate at their own pace and are not left on-hold for long periods of time. From a support agent perspective, working at their own pace and dealing with multiple end users at once, may mean reductions in both cost and improvements in customer satisfaction.

Estimating the financial savings available from chat is difficult. However, indicative industry feedback supports an estimated saving in total support analyst time of 33%, a considerable saving when an analyst’s time is recognised as one of the most valuable resources a service desk has.<sup>9</sup>

In SDI’s opinion, these benefits validate the chat communication channel as being of significant value to those who use it. While it is not surprising to see its use rapidly spreading within the consumer marketplace, chat adoption by corporate IT service desks has been gradual, as shown by SDI research. Diagram 1 shows that there is visible growth in chat adoption between 2009 and 2013 – increasing from 10% to 24%. However, it is important to recognise that it has taken four years to increase chat uptake by service desks by an additional 14%.

**Diagram 1: Live Chat Adoption Rates 2009 To 2013**

	2013	2011	2009
Telephone	96%	95%	98%
Email	95%	94%	94%
In person	62%	63%	58%
Voicemail	44%	38%	46%
Other	15%	11%	13%
Live Chat	24%	14%	10%
Blogs	3%	4%	5%
Twitter	13%	10%	4%
LinkedIn	5%	6%	3%
Facebook	6%	7%	2%
Pinterest	1%	N/A	N/A

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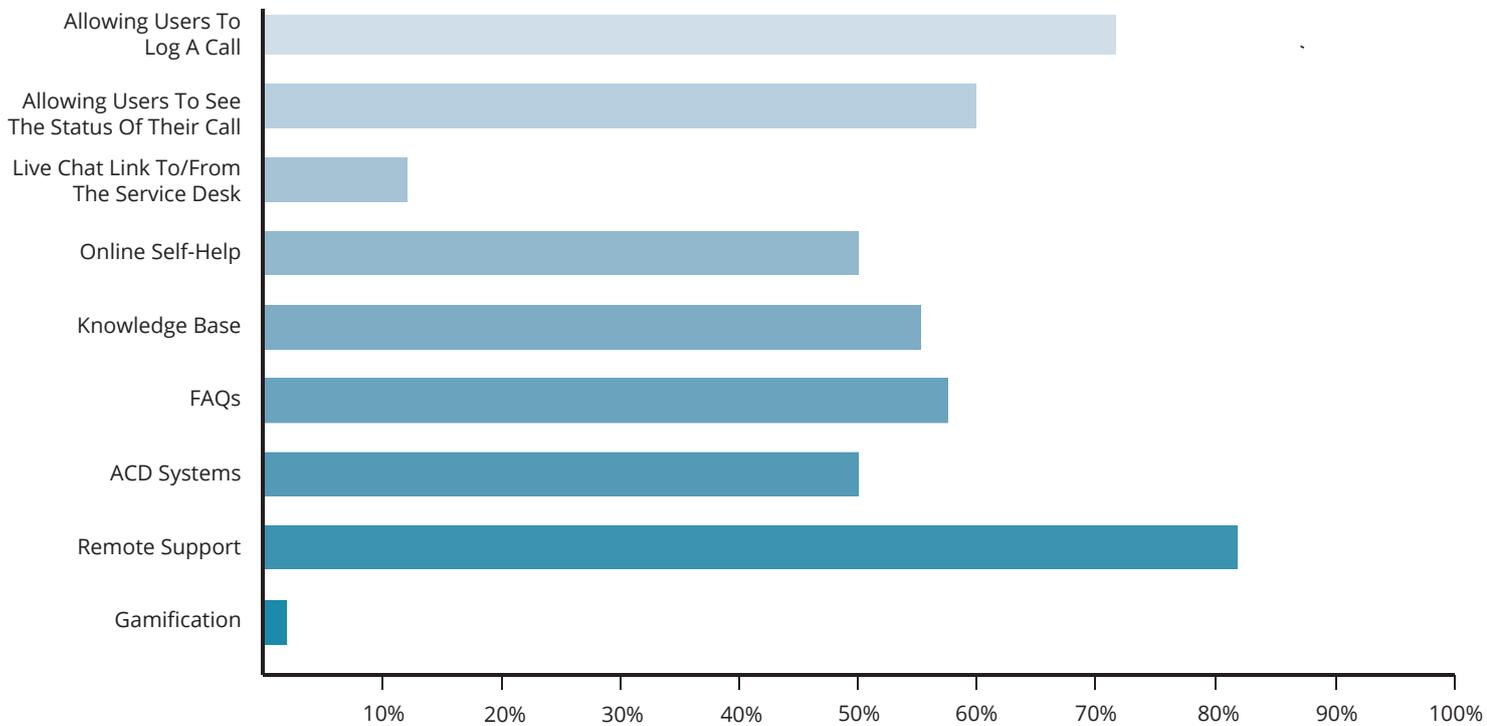
Of course, adoption levels will differ between industries. For example, as shown in Diagram 2, the public sector has one of the lowest adoption rates for chat at just over 10%.<sup>10</sup>

7. Edigitalresearch.com, “Edigitalresearch : News: Live chat rated highest customer service channel by consumers”, 2015

8. Edigitalresearch.com, “Edigitalresearch : News: Live chat rated highest customer service channel by consumers”, 2015

9. While most chat sessions last twice as long as a phone conversation, an analyst will typically handle three sessions at once. This yields an estimated saving in total analyst time of 33%.

10. Troubridge, Tessa, “Public Sector Benchmarking”, SDI Members Research Library, 2014

**Diagram 2: Live Chat Adoption Rates In Public Sector**

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### **TOP TIP #4**

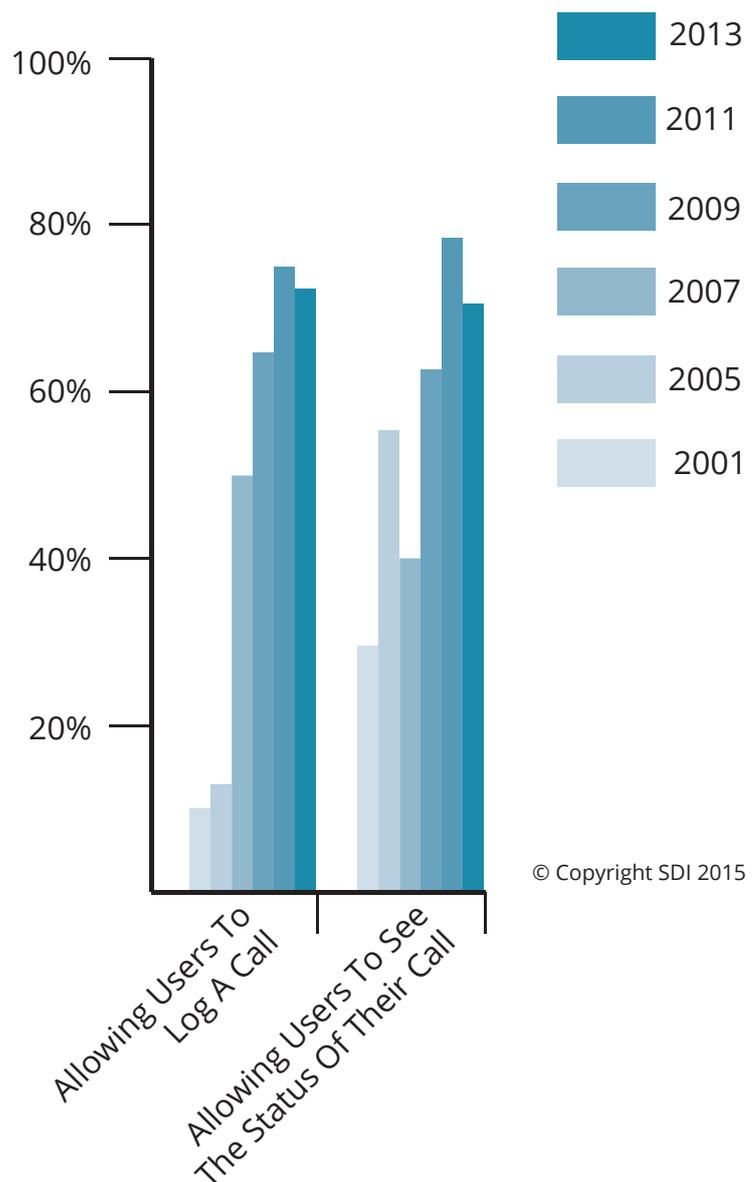
*Giving customers a high quality customer experience when using live chat will ensure they return to the channel again. To achieve this, service desks need to ensure customers aren't left hanging around and waiting. Remembering that at the end of the chat session is a customer waiting in real time will help guide the pace of the service required.*

## Self-Service

Self-service as a concept has been in the consumer marketplace for many years. Look at the success of the automated teller machine (ATM) or the increased popularity of self-service checkouts in supermarkets for example. Now self-service is also making inroads into IT service desk operations. Unlike chat, self-service has witnessed a comparatively high adoption rate (as shown in Diagram 3). SDI research indicates adoption rates are as high as 70%<sup>11</sup>, however a high adoption rate does not guarantee self-service success – as technology adoption is very different to end users actually using the self-service technology on a day-to-day basis.

The true measure of self-service success needs to account for the call avoidance principle – in that the self-service capability is successful because customers are using the channel instead of contacting the service desk directly.

**Diagram 3: Self-Service Adoption Rates 2001 to 2013**



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11. Statistics from Service Desk Institute benchmarking reports reveal a considerable proportion of service desks provide self-service facilities. Significantly, the research reveals that since 2001 the rate at which service desks have adopted self-service has increased dramatically due to an unprecedented rate of adoption for the technology in both its capacity to “allow users to log calls” and “allowing users to see the status of a call”. From 2001 to 2003, the report reveals that less than 10% of service desks were using the technology, this quickly spiked to 50% in 2007, over 60% in 2009, and over 70% in 2011 and 2013.

In SDI's experience, the absence of both customer engagement and effective marketing of self-service channels are the biggest obstacles to their success. Anecdotal evidence from the industry reveals an interesting paradox between customer expectations based on consumer experiences and the reality of corporate IT meeting those expectations. Initially we have the consumer experience of self-service – which appears to be exceptionally positive – and then there is a contradictory IT service desk experience. To illustrate the point, consumer-based research reveals a high utilisation rate led by positive experience. For example, a study conducted by Nuance Technologies revealed that 75% of those surveyed believed self-service to be a convenient way to resolve customer service issues<sup>12</sup>.

However, corporate IT service desks do not receive the same encouraging rates of self-service utilisation. Anecdotal evidence suggests that IT service desks need to go to great lengths to encourage end user utilisation – for instance, one service desk took the radical step of making self-service the only channel available on a Friday<sup>13</sup> – before they see a noticeable increase in end user utilisation.

Nevertheless, some corporate IT service desks do have successful self-service channels. And from these examples we can distil some of the characteristics that made them successful. Firstly, the service desks designed their self-service portals to be an adequate, if not superior, substitute to phone contact – which for many is the ultimate strategic aim – by ensuring that all but highly complex service desk interactions can be managed through the self-service portal. This is most effective when end users are consulted about what they would like to see in the self-service portal, along with their continuing involvement throughout the whole life of the self-service delivery project. This engagement is an effective way of ensuring end users buy-in to actually using self-service.

Another common characteristic is buy-in from key business personnel. For many service desks, this begins with top-level management and cascades down, ensuring that the service desk has the support it needs and from the right places.

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12. Nuance.com, "Survey Shows: Majority Of Consumers Frustrated With Web Self-Service, Want A "Human" Touch", 2013

13. The service desk developed the tool to ensure customers could use it to log all of their issues. Following this the email was shut down completely with the phone lines switched off for non-emergency issues on a Friday. This was also supported by a marketing campaign that had the catchy tagline "Don't wait in line – Get online." This project was discussed by Stuart Brookes of Doncaster County Council at the Service Desk Institute Public Sector event in 2015.

The final success characteristic has a surprisingly disproportionate effect on the success of the self-service channel: marketing. In SDI's experience, successful self-service portals all have a comprehensive marketing programme to support the self-service project. Service desks should create a company-wide marketing campaign that articulates the benefits of the self-service portal to individuals and the company as a whole. These should include statistics on the reduction in the waiting and resolution times customers will experience if they use the self-service portal over more traditional service desk channels.

In addition to the initial contact benefits, the ability to conveniently manage ongoing interactions with the service desk is a benefit that customers may not be aware of, even though it is likely to be a service they are familiar with in their consumer experiences.

For many service desks, self-service adoption has already been a valuable asset in their call avoidance programme – reducing call volumes and saving costs. In SDI's experience the reduction in cost per call has been significant<sup>14</sup>. However, while cost and efficiency savings are great news for under-pressure service desks, they must begin by ensuring that their self-service capabilities address the needs of their end users. Implementing the technology, with little end user adoption, is not the measure of self-service portal success.

### **TOP TIP #5**

*For self-service to be successful there is a need to keep monitoring and encouraging use.*

*So:*

- *Continue to involve your customers; actively seek feedback and be open to criticism;*
- *Monitor usage, and offer additional coaching and training;*
- *Consider, and try, different ways to increase self-service use and to improve ease of use; and*
- *Nurture and feed self-service activities like you would any other living thing.*

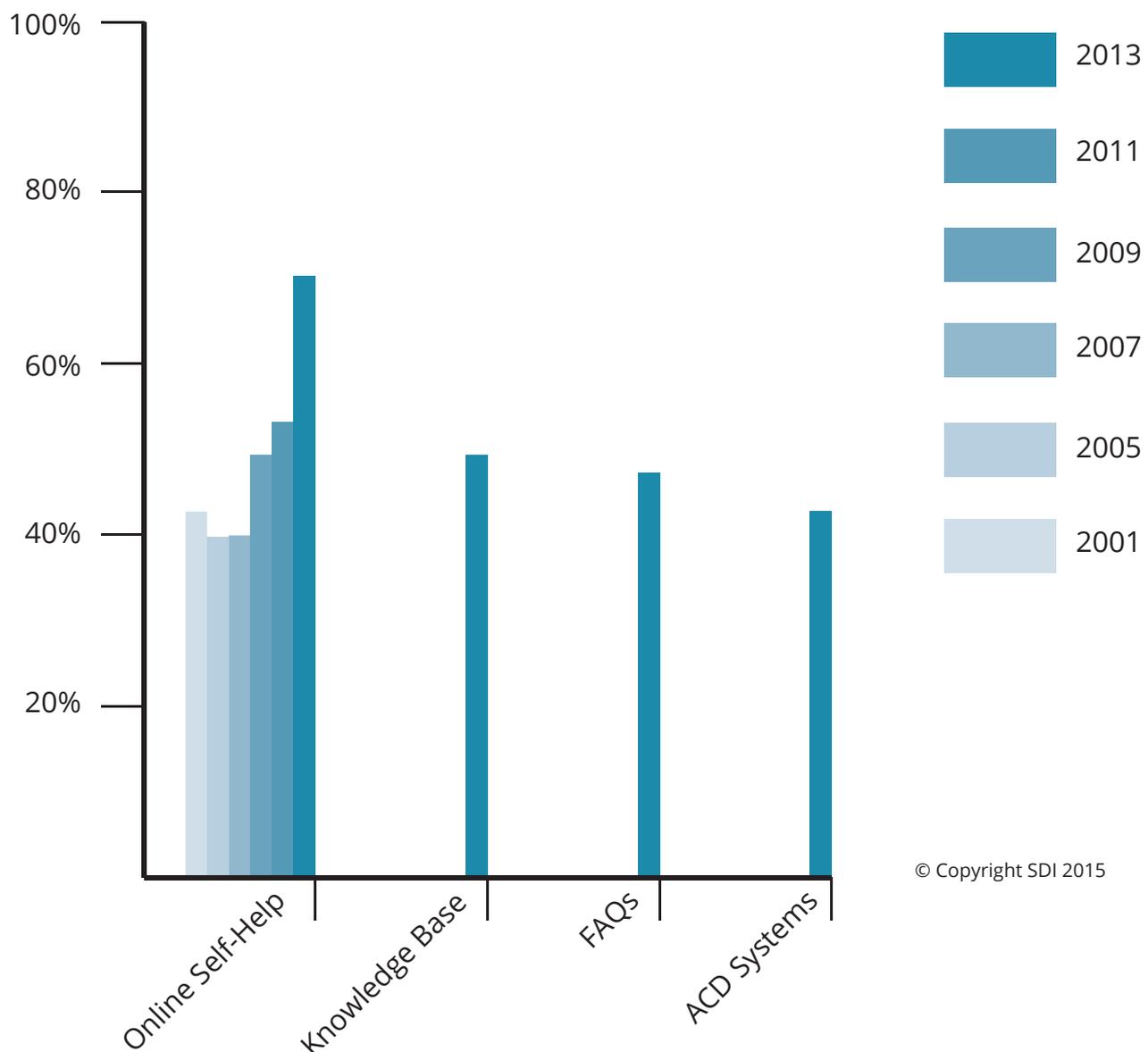
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14. Although many service desks struggle to measure the cost per call, those that do have recognised the significant reduction in cost – after their self-service tool has matured – when compared to traditional methods such as telephone support. In “The Better Connected SOCITM report” published in 2012, there is an estimated average cost per channel calculated at; £8.62 face-to-face, £2.83 telephone, and £0.15 via the web.

## Self-Help

For both the shift left and call avoidance approaches, empowering customers to resolve their own IT issues is the final level of maturity. Therefore, service desk professionals must consider the provision of capabilities that allow end users to resolve their own issues – an important part of their streamlining initiative. They also need to understand that the avenues of self-help are diverse. For instance they can include the provision of knowledge through blogs, frequently asked questions (FAQs), and forums. Or the provision of self-help technology such as password reset software.

**Diagram 4: Self-Help Adoption Rates 2001 to 2013**



For many service desks, the adoption of self-help follows a similar trend to that of self-service. According to SDI research, conducted over a period of twelve years, there has been a steady increase in self-help adoption since 2001. A variety of self-help capabilities – including knowledge bases and FAQs – showed significant growth and reached an adoption level in excess of 50% by 2013.

Service desk professionals will reap a range of benefits from the successful implementation, and adoption, of self-help technologies. For example, password resets – described within the IT support industry as one of the biggest drains on service desk time – can be left with end users to self-resolve through self-help technology. In addition, the provision of knowledge bases and FAQs can help service desk analysts articulate the best way to resolve an issue, with repeat delivery of the solution and the desired end result of greater end user self-sufficiency. Even blogs – detailing service desk events and upcoming work – can help to reduce calls to the service desk as end users are kept up-to-date on things that might affect them.

### **TOP TIP #6**

*It's not about the technology – it's about what comes from the productive use of the technology. Bear this in mind when rolling out self-help tools as the way end users will use the technology is the decider. Ensuring customers and the business guide the way when technology is deployed will ensure buy-in once it goes live.*

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15. An SDI report titled the “Anatomy of a Service Desk” revealed that 5% of service desks regard password resets to be the biggest drain on their time.

## Super Users

For many of us the prospect of a “super user”<sup>16</sup> is not as far-fetched as it initially sounds – imagine the office Microsoft expert for instance – and we can see the value that these individuals can potentially bring to the support structure. However a super user’s role is broader than that of a technology expert user. The super user role not only adds to the support structure, but can also influence strategic decisions for the service desk based on the feedback of their experiences of using corporate IT.

The benefits super users bring to the IT organisation include:

1. Filtering requests and certain issues on behalf of the user community.
2. Providing business knowledge and insight, including the evaluation of processes and how services are working in practice.
3. Being a valuable sounding board for the introduction of relevant IT services.

### **TOP TIP #7**

*As with self-help, be careful that being a super user isn't at the expense of the end user's day job – especially if they get more recognition and adulation for it!*

## Social IT

Service desks should take notice of another support innovation that has become increasingly popular in the consumer marketplace – social IT.<sup>17</sup>

“Community-based support” has been available in the technical support community for many years. In fact service desk professionals should consider how often they find themselves in a public technical forum when troubleshooting an issue. This peer support mechanism has now evolved into a support model called social IT.

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16. In the book “Foundations of ITIL”, Annelies van der Veen and Jan van Bon discuss the importance and usefulness of super users, stating that they “can be asked to filter requests and certain problems on behalf of the user community”. The book also states that “as a business user, a super user often has thorough knowledge of important company processes and knows how services are working in practice. It is very useful to share this with the service desk, so that it can offer better quality services in the future”

17. Social IT is the use of social media in an IT support environment to open new communication channels and support end-users on a platform that they feel comfortable with.

Through the use of social media technology and online forums, some companies have been able to shift their support structure to put peer-to-peer support at the centre. Through this medium, the users of technology are able to offer each other support and guidance through their personal experiences and knowledge. This particular support structure already has considerable adoption in the consumer marketplace, and is interestingly often regarded as one of the easiest to access, as well as one of the most trustworthy sources of support. In part due to the fact that advice and solutions are provided in a style and perspective that is comfortable and relevant to the end user.



Service desk professionals might immediately recognise the potential benefits available from the use of social IT – such as quicker support, potential cost savings, and the fact that it helps to break down operational and knowledge silos while exploiting the considerable pool of end user knowledge. Service desks need to consider the validity of social IT in their support structure as they drive support closer to the customer using the most efficient and cost effective channels.

The role that social media has played in the consumer marketplace is staggering – consider the societal impact social media giants such as Facebook and Twitter have had on how people communicate as a starting point. For some, especially the young, social media has removed the need for email and telephone calls. Thus social media needs to be factored into IT's strategic plans for supporting their end users.

However, SDI research into the adoption of social media in the IT service desk industry up to 2013 shows a disappointing level of adoption, with many service desks building a tentative social media presence at best.

**Diagram 5: Social Media Communication Channels 2009 to 2013**

	2013	2011	2009
Telephone	96%	95%	98%
Email	95%	94%	94%
In person	62%	63%	58%
Voicemail	44%	38%	46%
Other	15%	11%	13%
Live Chat	24%	14%	10%
Blogs	3%	4%	5%
Twitter	13%	10%	4%
LinkedIn	5%	6%	3%
Facebook	6%	7%	2%
Pinterest	1%	N/A	N/A

Diagram 5 shows that the increase in the utilisation of social media between 2009 and 2013 – with the exception of Twitter – is weak, amounting to little more than a few percent rise over several years.<sup>18</sup>

### TOP TIP #8

*Get the technology in place to ensure your social IT provision is consolidated and consistent. Freshdesk advises that without a proper social customer helpdesk tool, you could leave your agents juggling between multiple social media profiles, trying to keep pace with both your traditional email and phone support as well as the real-time support queries coming in through email and phone.*

18. Research into the adoption of social media as part of a service desk's support structure reveals a level of tentative concern within the industry. The use of Facebook and LinkedIn has seen a minor increase between 2009 and 2013, little more than a few percent. Twitter, on the other hand, has seen a comparatively significant increase moving from 4% in 2009 to 13% in 2013. Further investigation of the data, and engagement with industry members, reveals that this spike is largely led by service desks in higher education who have recognised the value that students place on social media as a communication channel.

# Using Knowledge Effectively

Accurately reflecting the value that knowledge has within the workplace is challenging, despite it being of tremendous value. Conventional ROI calculations do not give service desk professionals the answers that they are looking for – as knowledge can be both explicit (written down or tangible) or tacit (intangible, gleaned through experience and interaction, and thus unseen until shared). As a result it is not always possible to gauge the value or impact a knowledge article has on a service desk analyst's ability to resolve an incident, for example.

Despite this, organisations have attempted to calculate the value of knowledge through various means, to cite a specific example – “Xerox’s Eureka database for communicating copier repair tips among technicians cuts costs by about 10%.” This statement, made by Dan Cohen of the Harvard Business Review, shows that although exact ROI is difficult to calculate, the overall benefits of knowledge can still be felt by an organisation. Cohen also states that ‘Xerox arrived at that figure by conducting a controlled experiment to compare the efficiency of groups that did or did not use the database’.<sup>19</sup>



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Service desk professionals must accept that the role of knowledge in the service desk will not fit neatly within ROI calculations and instead they need to present its value through changes and improvements in work practices. For evidence of success, service desks can turn to the metrics they measure – a knowledge article that is published detailing a resolution should have a positive impact on the resolution rate of that incident category – to ensure the quality of shared knowledge leads to effective outcomes.

19. Cohen, Dan, “What’s your return on knowledge”, Harvard Business Review, <https://hbr.org/2006/12/whatsyour-return-on-knowledge>, 2006

## **TOP TIP #9**

*For a knowledge management system to be effective it needs to be:*

### **Accessible**

*In practice, it is all about the search function. Without a good search function an analyst will struggle to get hold of the information they need in a reasonable time frame. Accessibility can also be aided by accurate categorisation of knowledge articles so a quick search will get analysts where they need to be.*

### **Concise**

*For an analyst on the phone to a customer, a concise knowledge article is essential. If the important points are buried inside an enormous report, an analyst may miss the good stuff or just give up. Keeping knowledge articles brief and relevant ensures the right information gets seen.*

### **Contemporary**

*It is crucial that knowledge articles are kept up to date as technology and processes change. This can be managed through change, release and technology introduction processes. As an example, make knowledge creation and management a key task in your release and new technology introduction policies.*

### **Trustworthy**

*Having a process that ensures knowledge articles are reviewed for accuracy protects the reputation of the knowledge management system. This is most effective when a virtual team of moderators is set up to review the articles and ensure they are of a consistently high quality.*

# Using Systems Efficiently

For service desks using a diverse range of enabling tools and technologies can present a number of challenges. Often these technology-based challenges relate to the way that the systems communicate and interact with each other, which can lead to unnecessary manual intervention and processing. This in turn adversely affects the service desk's ability to innovate and streamline operations.

An immediate benefit of traversing such challenges is reaping valuable streamlining opportunities through the integration of systems and the automation of processes. When these challenges present themselves, service desk professionals must address the available opportunity and work to reduce time-consuming manual tasks wherever possible – especially where automation can effectively replace manual labour.

Integrating disparate systems is also valuable from a data perspective. It will offer larger data sets, and different insight, and the intra-connectivity between systems will also reduce the need for service desk professionals to perform costly, repetitive, and unnecessary tasks.

## Integration

Many service desks can reap the benefits of integration – such as increased efficiency, streamlined customer support, and resource optimisation – through the automated transfer of information and the automated initiation of actions. Integration need not be synonymous with expensive projects, as many technologies and tools now have the capability to be easily integrated together through APIs. Remote connection tools, for example, can now be integrated with service management tools with relative ease.

Innovating through integration will ensure that the service desk gets the most out of its existing technologies, and might even prolong their value to the business. Encouragingly, recognition of the value integration capabilities bring to the service desk is also increasing with research conducted by the SDI revealing that 45% of service desks are interested in integration of which 43% are actively working to integrate technologies.

### TOP TIP #10

*Projects that attempt to integrate everything at once are less likely to have a successful, timely, on-budget rollout. Instead, focusing on integrating specific technology groups or working towards a defined outcome will accommodate smaller, more manageable integration projects.*

## Automation

The goal of automation is similar to that of integration – the drive for efficiency through the development and structured management of a system or process. However where they differ is in the emphasis automation places on the removal of manual human activity. To illustrate automation, consider the automatic assignment of priority within a service management tool based on the impact and urgency an analyst defines. The analyst does not need to assign the priority, it is completed for them by the system using the service level agreement (SLA) associated with, and defined for, the issue type. While this is a relatively simple example of in-process automation, modern service management technologies allow for the initiation and execution of more time consuming activities. For instance the deployment of new software to every employee in a sizable business function through a single command.

Thus, for most service desk professionals, the real value of automation is the time they save from avoiding routine, repetitive, and sometimes unnecessary manual interventions. This saved time translates into business and end user value, as the service desk professional is able to reassign their time to more relevant areas of the support structure, as well as deliver against end user needs more swiftly through the automation.

### **TOP TIP #11**

*Use data to drive decisions on what needs to be automated. Focusing on time-consuming manual tasks – such as manually writing a call closure description for a frequent call like a password reset – will identify the tasks and processes that will have the greatest impact when automated.*

# Conclusion

For many service desks the need to “do more with less” is more pronounced than ever – as their budgets come under even greater scrutiny and, potentially, attack. Thus service desk professionals should seek out the wealth of knowledge, experience, research, and opportunity in the consumer marketplace that will help to guide them through adopting new technologies and approaches to deliver better service through a streamlined and improved IT support structure.

The pool of technologies, approaches and practices in the consumer marketplace which service desks can tap into is enormous. Adapting service management strategies – such as Lean IT and Shift Left – to the service desk environment will give service desk professionals the direction they need to effectively streamline and improve their services.

In addition, leveraging innovative communication technologies that have proven effective in other industries and organisations can offer service desks tangible savings through the way they deliver services to end users. These technologies, ranging from self-service portals to live chat, offer service desk professionals the opportunity to reduce time and cost overheads and ensure the sustainability of the support function.

Optimising the knowledge the service desk has access to drives service improvement through consistency of service; however this is not the only value the service desk can expect to see. Knowledge management will improve vital service desk metrics – such as first contact and first level resolution – by ensuring analysts have access to the knowledge resources they need to effectively deliver IT services.

Finally, the optimisation of IT systems – through automation and integration - will offer the service desk a practical route to streamline their support structure through the removal of unnecessary manual processes, ensuring valuable service desk resources are instead focused on areas of the support model that provide the most business value.

This report, then, should inspire service desk professionals to take a look at their service from a consumer perspective, recognise what will provide the most value and work to streamline services ensuring the position of the service desk remains sustainable.

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# About SDI

The SDI company mission is to inspire service desks to be brilliant. To achieve this mission SDI has developed a set of goals by which it aims to inspire service desks to:

**Embrace:** To raise the quality of service delivery by valuing best practice

**Engage:** To create an inspiring and engaging customer experience

**Invest:** To empower their teams to be inspired, take action and be better

**Shine:** To demonstrate and deliver exceptional business value

SDI sets the globally recognised best practice service desk standards that provide clear and measurable benchmarks for service desk operations and professionals. The standards are designed to encourage service desks to embrace and value best practice in order to raise the quality of service delivery.

For more information about SDI please visit [www.servicedesk institute.com](http://www.servicedesk institute.com)

# About Freshservice

Freshservice is a cloud-based IT service desk and IT service management (ITSM) solution that is quick to setup and easy to use and manage.

Freshservice leverages ITIL best practices to enable IT organizations to focus on what's most important – exceptional service delivery and customer satisfaction. With its powerfully simple UI, Freshservice can be easily configured to support your unique business requirements and integrated with other critical business and IT systems. Native integrations are provided “out-of-the-box” with many of the most popular cloud services such as Google Apps, Dropbox, AWS, and Bomgar to speed up deployment and reach.

Freshservice is built on the proven Freshdesk platform, whose flagship customer service offering supports more than 50,000 customers worldwide, including Honda, 3M, Macmillan, Bridgestone, and Unicef.