

Intelligent Disobedience : It's Time to Empower Your Service Desk Agents

by Ivor MacFarlane



The last ten years have seen a growing need for corporate IT organizations to deliver service desk capabilities at lower cost. Which in turn has generated two clear trends, both driven by the presumption that the service desk role is mostly routine and predictable: the deskilling of the service desk role – with staff expected to follow set rules, scripts, and procedures; and automation of the first point of contact through self-service.

However, the now-prevalent low-cost, script-based service desk strategy is being disrupted by two customer support trends:

- 1) Fewer simple, standard issues or requests are hitting the service desk due to self-service.
- 2) End-user consumer experiences are raising employee expectations of service and support.

Consequently, service desks need new approaches that allow them to deliver more appropriate IT support and a better customer experience. This white paper explains why service desk staff need to be empowered to use their initiative. Offering insight into how two relatively new IT support approaches – “Standard+Case” and “Intelligent Disobedience” – can help service desks to deal with non-standard and unexpected issues. It also offers practical advice on how to establish the right environment for staff empowerment and outlines the required management approaches and operational changes necessary to support the empowerment. With knowledge management and automation still playing a big part in ensuring that support is delivered in an optimal manner.

MODERN SERVICE DESKS REQUIRE A NEW APPROACH TO SUPPORT

In the early 1990s the IT help desk was still a reasonably new idea – with dedicated resources focused on the day-to-day communication with users of IT services. This idea soon became accepted as good practice and de rigueur for most IT organizations. Then the IT help desk became the service desk and as IT budgets came under pressure it was soon to be seen as an “expensive necessity” in the eyes of CIOs and CFOs. It was the dawn of the low-cost, high-volume service desk.

The Evolution of the Low-Cost Service Desk

The accepted need for lower-cost service desk capabilities has in turn generated two clear trends, both driven by a perhaps tacit presumption that the service desk role is mostly routine and predictable:

- **The deskilling of the service desk role.** With staff expected to follow set rules, scripts, and procedures to deal with expected questions and requests. This was sometimes accompanied by outsourcing (and also commonly offshoring) to staff with less knowledge of the organization, the services being supported, and the attitude and culture of the callers.
- **Automation of the first point of contact through self-service.** This was achieved through the use of integrated tools combining service catalog, service request, incident logging and allocation, and self-help capabilities.

Both of these trends offered value to organizations. They allowed end users calling in with requests or issues to get responses that quickly – and cheaply – addressed the vast majority of concerns.

This is still the case with the ongoing increase in automation. With the uptake fuelled by the modern cultural predisposition towards self-service rather than person-to-person interaction. Employees expect to be able to request and resolve matters as they would do in their everyday lives. Which is usually – and certainly as a first option – via online interaction with technology rather than by a telephone call to a human being. And this has contributed to the changes in the second bullet point beginning to consume those of the first one – with fewer staff needed to deal with the reducing number of calls.

The Need for a Standard+Case Approach

Fundamental to addressing these modern service desk staff trends are the ideas developed and published by Rob England¹ in his “Standard+Case” philosophy and set out in his books, talks, and articles.² Standard+Case is a fundamental building block for this white paper. It proposes the need for two different kinds of approach to two different kinds of service desk situations:

- “Standard” situations which can be addressed by laid down processes and procedures. They are expected, predictable and, for the most part, solvable through reapplication of known techniques and approaches. In other words normality for most people.
- “Case” situations are the exception; they present unexpected symptoms, and so cannot be dealt with by expected remedies. Each one requires examination and understanding of the situation, and appropriate action will need to be determined. At the very least, it will need a variation of normal procedures, often it may need the invention of a new solution. While useful techniques to help build case solutions do exist, each situation is different and needs to be considered as a unique case.

The Impact of Self-Service and Automation

The need to deal with ever more requests and concerns via automation and technology-based self-service implies a significant impact on the balance of calls made to first-line support. The number of calls made drops significantly but the nature of the calls also changes, so that the majority are about exception situations, made because the caller cannot get what they need from the self-service or automated systems that are now their first point of call. This means that the average skill levels required for effective first-line person-to-person support roles will increase. Which is inconsistent with the still-prevalent trend of deskilling of service desks and focusing on their cost rather than their value.

¹ Rob England is probably better known as the IT Skeptic: <http://itskeptic.org/>

² Learn more about Standard+Case here: <http://www.basicsm.com/standard-case>

Diagram 1: The Conflict Between Service Desk Staffing Trends

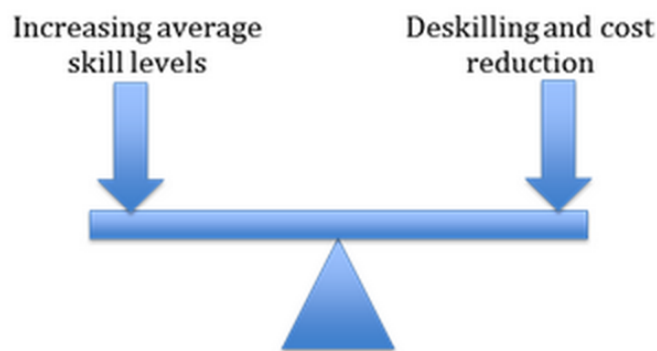


Diagram 1 illustrates the conflict between the two service desk staffing trends. Overall cost reduction should still be possible by using self-service and automation to significantly reduce the number of calls, but it needs to be combined with action to increase the skill levels of the remaining staff. This is to reflect the fact that staff are now dealing almost exclusively with complex and difficult calls that require understanding, empathy, and innovation rather than a slavish following of laid down processes.

INTRODUCING “INTELLIGENT DISOBEDIENCE”

The service desk has always received difficult calls and situations that require reinterpretation of the standard rules and processes – the so-called exception situations. However, automation and self-service have created an environment where exception situations will no longer be the service desk exception, but the norm. With almost every call requiring individual thought and attention and many needing genuine innovation.

Rob England’s Standard+Case material deals generically with a wide range of Case scenarios and problem solving. The rest of this white paper builds on Standard+Case, examining one idea – Intelligent Disobedience – and some of the consequences of employing and appreciating it.

So What is Intelligent Disobedience?

This term has been used in the training of service dogs for over 75 years, and we can be confident that the idea is many times older than that. At its heart is the idea that the dog, or person, with the most valid up-to-date information is best placed to judge if the normal rules apply or if they should act differently than instructed because of the circumstances they detect.

It is a service dog concept and so a service dog example is a logical place to start. Imagine a blind person walking with their seeing-eye dog up to the roadside, a route they have used many times. The dog sits and the owner presses the button to activate the “safe-to-cross” signal. The audible signal is heard but the dog doesn’t move. A gentle prod and a word have no effect – the dog has seen a speeding car that is clearly unable to stop despite the red stoplight. Disobedience here has saved a life – or maybe more than one.

In fact there are levels of obedience/disobedience that can be set beforehand. A typical service dog one relates to walking down steps. Dogs can be trained to stop at the top of stairways and only proceed down when an agreed code word indicates to the dog that the risks are known and being taken on purpose.

Intelligent Disobedience in the Service Desk

Where rules are written for the expected situation, there is significant potential for Intelligent Disobedience to contribute towards a quicker resolution and better customer satisfaction in the face of the unexpected. And when the majority of calls are likely to be exception situations, having this ability is an asset to a support organization.

Of course, this is not advocating the abandonment of rules. Where standard situations are dealt with by technology there should be a path to follow, but with the additional option to innovate where necessary. The aim should be to generate an environment where these situations are correctly assessed, only appropriate and relevant innovation is launched, and staff are supported in their actions.

Establishing the Right Environment for Intelligent Disobedience

Inevitably much of the focus with Intelligent Disobedience is on the disobedience aspect, but the important part is actually the identification, development, maintenance, and application of relevant intelligence.

Finding disobedient staff is not difficult; but finding, and then keeping, suitably intelligent ones can be. For this kind of innovative service desk option to be viable, a range of factors is required:

- Empowerment – it must be possible for staff to move away from laid down procedures when it is valid to do so.
- Experience/knowledge/skill – these are needed to consider situations and make decisions, and they need to be maintained.
- Confidence and support – innovative resolution depends on having the self-belief to make decisions and to act on them; and that in turn depends on the knowledge that such decisions will be supported.

Empowerment for exceptions

Empowerment is not about giving staff absolute freedom to do whatever they feel best, this would be anarchy and chaos. Instead empowerment can be bounded, and structures built, to help staff make good choices and set risks at the correct, deliberately-agreed levels.

Staff need to be clear about where flexibility is expected, and what might never be variable. Examples could include:

- Limits to compensation that can be offered to customers.
- Acceptable and unacceptable language rules can be laid down.
- Some legal requirements may be mandatory, even though they inhibit good customer relationships.

But staff also need to know that, within the extremes, they can deal with situations as seems right. This delivers a staged series of steps for conforming to, or deviating from, procedures:

- Following normal procedures when it makes sense to do so.
- Awareness of when circumstances are not following the presumptions within the procedures.
- Ad-hoc development and consideration of alternatives within overarching rules and guidance.
- Development of alternative approaches and discussion and adaptation of those approaches with the customer, and/or with other support staff or suppliers.
- Documentation and recording of the resolution offered and accepted.

The last stage is important because the intention is not to require innovation each time a recurring issue is faced. As the Standard+Case approach teaches, an exception (Case) issue that occurs many times becomes the Standard and procedures that address it can be developed, automated, and moved into the routine area. In practice most standard approaches start their life as non-standard ones.

Knowledge Management and Knowledge Base

The first goal with Intelligent Disobedience (as with ITIL™ incident management) is to resolve the customer's concern, request, or complaint. But applying innovation is usually also exploring new territory. Not documenting that innovation is to condemn a support organization into using this expensive means of resolution every time. When instead, lessons learned should be easily accessible for future situations – to give suggestions on what to do and, equally importantly, what not to try again.

So, knowledge management is a critical aspect of empowering Intelligent Disobedience in a service desk environment – fast and easy access to history, and other relevant knowledge, is a critical factor in offering relevant support in non-standard situations.

Equally, staff who are expected to be innovative in dealing with customers also need to be structured and methodical in capturing their actions and reasoning in an easily retrievable fashion. Despite the sound of it, Intelligent Disobedience in the service management context should be very far from being unstructured and cavalier in its execution. Rather it is a fundamental part of the organized knowledge capture and retrieval procedure.

CREATING THE INFRASTRUCTURE FOR INTELLIGENT DISOBEDIENCE

All of the aspects mentioned so far are – or should be – within the capabilities of good service desk staff. As the number of staff required declines due to the increasing levels of automation, retaining those with the most experience of the organization and who have showed good aptitude makes sense. However, there is a temptation in some organizations to view anyone talented within a service desk environment as a candidate for moving into other parts of the business. But with the role becoming more and more based on dealing with mostly exceptional issues, this should be less relevant than it used to be. If indeed it ever was a sensible approach.

Delivering a higher skilled and “innovative where necessary” service desk rests most strongly on a supportive – and for many organizations new and different – form of management. One that focuses on support and encouragement. Managers need to understand that in the less-precise world of dealing with exception conditions, 100% success is not a realistic target. Situations addressed logically and realistically that eventually do not succeed should still be worthy of support, reinforcement, and reward for appropriate behavior – they are not failures on the part of the operatives.

Managing for Intelligent Disobedience

Appropriate management attitudes and support are the essential precursor to achieving the benefits of appropriate Intelligent Disobedience in a service management context. Key aspects include:

- **Awareness.** If an organization wants to benefit from staff delivering Intelligent Disobedience then those staff must be aware that such behavior is allowed and encouraged in the right circumstances.
- **Boundaries.** Management needs to set out which rules are immutable and, at the other end of the spectrum, where interpretation is encouraged. There may be some rules that require checking on before they can be disregarded. And all of these boundaries may be moveable, perhaps due to external factors such as time of the week/month/year or even the weather. These boundaries need to be easily understood by staff and maintained to reflect the up-to-date situations and environment.

- **Knowledge management.** Data, information, and knowledge need to be captured, maintained, and made easily available. The interface between the automated technologies, that can capture and build data and information, and the human factor that builds knowledge and applies wisdom is a vital differentiator in getting the best value out of the combination of “man and machine” in the 21st Century environment.
- **Recognition and reward.** Some of the traditional means for judging staff performance apply to both conventional and Intelligent Disobedience approaches, notably customer satisfaction. Other factors need to be amended to reflect the encouragement for initiative. Most notable and different is the reward for initiative and effort even where those efforts might not be successful. At the very least a “no blame” culture is essential.
- **Support for decisions made.** The application of Intelligent Disobedience and innovation is rarely 100% reliable. In a non-safety-critical situation an organization might expect, say, 80-90% of innovative customer interactions to be successful (and success needs to be pre-defined, perhaps in terms of positive feedback, or the absence of negative feedback). Unless staff are supported for appropriate actions, whether or not ultimately successful, then they will become reluctant to adopt such an Intelligent Disobedience approach in future. Following strict procedures instead can then ultimately turn the 80-90% success rate back into the 10-20% achieved through strict application of inappropriate rules. This calls for leadership rather than management, and a change in attitude amongst senior staff.

Using “Learning and Practice” to Drive Intelligent Disobedience

Like all experience-based skills, Intelligent Disobedience needs to be learned and practised. However effective Intelligent Disobedience relies on more practical learning, rather than remembering rules and procedures. The learning of facts, circumstances, opinions etc. is important but these need to be input to experiential learning to hone the relevant skills. There are, in fact, approaches in traditional service management and IT practices that are similar in nature and should give the service management organization a foundation to build relevant training/practice for delivering useful Intelligent Disobedience:

- Experience of using workshops to determine the best options from a range of approaches – for example configuration management or change schemes – are familiar to service management professionals, and the format is equally suited to developing good Intelligent Disobedience attitudes and parameters. As with all workshops one vital aspect is to ensure that the attendees include those who will actually do the work, not just management, advisers, and recipients.
- The concept of “service rehearsal” is familiar within the context of ITIL Service Transition, as a walk-through of a new service and its supporting elements before go-live. It is service management equivalent of the theater’s dress rehearsal. This type of role-play and walk through with discussion and feedback is an ideal way to train, trial, and refine the skills required for Intelligent Disobedience. Sophisticated and expensive experiential learning products are available and these undoubtedly have value, but most organizations will be able to create their own workshops at relatively low costs.
- Expanding incident and problem review sessions to explore alternative approaches and their likely outcomes is also a very valuable, and inexpensive, method for deriving future guidance and exploring the likely consequences of different actions.

Creating Intelligent Disobedience Supportive Procedures

Precise, detailed, and prescriptive procedures are the lifeblood of dealing with the “Standard” situation, but procedures are also relevant for the “Case” situation. Not least procedures that recognize the limits of their applicability. Phrases like “will not apply if xxxxx happens” can be most helpful in boosting operator confidence for innovation.

Awareness of the Intelligent Disobedience concept is also a useful factor in building procedures. In fact procedures should be built to diminish the need for such disobedience. A procedure that is unnecessary, restrictive or specific merely creates a need for challenge without necessarily offering value from its restrictions. One example of this can be referred to as “Accidental Cultural Imposition” (ACI) and it can be frequently seen in procedures, software, and even national laws.

Avoiding Accidental Cultural Imposition

This is a person or team building procedures, rules, or laws unconsciously building them the way they think or usually act, even when the procedure is to be applied to a wider environment. A simple and fairly trivial example is expenses reimbursement. One company's global reimbursement policy states that meals will be reimbursed against receipted claims to a maximum amount of \$10 for breakfast, \$20 for lunch, and \$40 for dinner. This almost certainly reflects the way those who drafted, agreed, and published the rule eat each day. And the rule might work in their culture but it is supposed to be global. Applying it to cultures where eating patterns are different (for example Brazil, where the main meal is taken at midday) needlessly creates the need for calls to query and complain and for the application of Intelligent Disobedience to resolve the situation. Instead if the rule simply says \$70 a day maximum everything would be easier.

This is just one trivial example but it is a pervasive issue, caused in part by over-detailing rules. There is much that could (and will) be written about this but for the purposes of this white paper, it is used as an example of the need to build processes with Intelligent Disobedience in mind. Specifically that the intention should be to design procedures in such a way that obviates the need for innovative interpretation of rules by keeping those rules as general and non-specific as is consistent with their need. Intelligent Disobedience is necessary in many situations and it is desirable to facilitate it when required, but it should complement sensible procedures not replace them.

That said, when an organization staffs their customer support with skilled and empowered staff there shouldn't be a need for procedures to try and foresee every conceivable situation. There is a balance point beyond which the cost of building and maintaining overly-detailed procedures is more than dealing with the resulting exception calls. It is realistic to expect "Case" calls and to allow them to be dealt with as such, not to try to foresee the unforeseeable.

NEXT STEPS

Concepts such as Intelligent Disobedience are a useful, if not critical, capability for modern customer-oriented service delivery organizations. The increasing degree of automation accentuates the need and can also support the delivery of this kind of customer support. It relies heavily upon the skills, knowledge, and experience of both staff and their managers. But it is also important that it works with automation and knowledge management.

Whether it be Intelligent Disobedience, self-service, or automation, Freshservice is here to help – with an approach that looks at service management through a customer service lens. We are committed to supporting customers and other corporate IT organizations through the sharing of thought leadership and best practices, and the provision of solutions to enable corporate IT, and its support, to thrive in a consumer-driven world.

ABOUT THE AUTHOR



Ivor MacFarlane

Follow him at :

[@ivormacf](#)

<http://www.macfpartners.com/>

In 23 years working for the UK government, Ivor Macfarlane moved from forestry to ITSM via prison, stores and training. He has worked as a service management trainer, consultant and writer since going freelance in 1999 and then after a 7 year spell with IBM he is now independent again working through MacfPartners to deliver training and consultancy to customers. He was an author for ITIL (versions 1, 2 & 3), ISO20000 and ITSM library and an ITIL examiner since 1991. He is well known at ITSM events having presented at many around the world (39 countries so far) and is an active contributor to social media.

ABOUT FRESHSERVICE

Freshservice is a cloud-based service desk and IT service management (ITSM) solution that currently serves more than 4500 SMB, mid-market, and enterprise customers worldwide.

Freshservice is designed, using ITIL best practice, to help IT organizations to focus on what's most important – exceptional service delivery and customer satisfaction. In addition to supporting their service desk and ITSM needs, these customers choose Freshservice based on ease to use, speed of setup, customer service, and affordability.

Freshservice has an intuitive UI, is effortlessly configurable and customisable to meet customers' exact requirements, and is easily integrated with other business and IT systems. Native integrations with a number of popular cloud services such as Google Apps, Dropbox, AWS, and Bomgar also speed up deployment and reach.

Freshservice is part of the Freshdesk product family, whose flagship product is the leading customer support solution Freshdesk – with more than 50000 customers worldwide, including Cisco, Honda, 3M, The Atlantic, and QuizUp.

For more information on Freshservice, and how we can help
please contact hello@freshservice.com

