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SERVICE DESK

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Service Desk A to Z

As recently as say, five years ago, the service desk has been seen as the ugly duckling of IT. A necessary evil that exists because users need to have a place to raise their queries and issues. Fortunately, there's been a significant effort from professionals and organisations in the service and support industry to redress this misconception of the service desk over the last few years, perhaps most notably from The Service Desk Institute (SDI).

When you lift the lid the service desk can be a rich resource of information that can help an organisation be more successful. Through a better understanding of things like: their user/customer habits, where investment may be required (in people, technology, etc), user/customer perception of products and services, and much more.

Knowing where to start with creating an efficient, successful, and value generating service desk – that supports the organisations objectives – can be daunting. To help, I've put together the following handy A to Z of service desk considerations to help anyone looking to start a service desk improvement project.

Automation, Automation, Automation

Imagine a world where in your day job you don't have to do anything, because 'stuff' just happens. Sounds great, right? Okay, the reality of automation will never be that glamorous, but what if you could eliminate all of those boring, monotonous tasks, and focus your energy on really making a difference?

When tackling repetitive tasks, take a moment to consider if the task could be automated. In theory, you could automate pretty much anything, with enough investment. Although, some things will be quicker to automate and add more immediate value than others. Some common things to ask yourself include:

- Can you implement a self-service password recovery system for your users?
- Can you automatically generate that monthly report?
- Do incidents and service requests reach the appropriate resolver groups first time?
- Can you automatically send a survey to a customer on incident/service request closure?
- Can your systems apply common remedial tasks (reboot, check for updates, virus removal) before incidents are raised?



Best Practice

There's a wealth of 'Best Practice' pieces out there, think ITIL, VeriSM, COBIT, IT4IT, etc. The one that, in my opinion, best serves the service desk is SDI's Global Best Practice Standard for Service Desk. I was involved in the creation of the 2019 revision, so perhaps I'm a little bias. However, what I will say is that SDI's offering pulls together many modern ways of working, creating a really comprehensive framework for which to assess a service desk's operational and strategic maturity.

That's not even the best part... the entire Standard is available **free of charge!**

Continual improvement

C had to be continual improvement really. But what is it? Often, continual improvement is an after-thought. Something that gets tagged on to the end of a project, for example, to provide a mechanism for feedback. It's so much bigger than that. Continual improvement should be a mindset. It should be embedded in the organisational culture. It should be a part of everything that we do in the service industry. You know the saying? There's always room for improvement. That is so, so true. When you consider the pace of technology, the changes in customer expectations. The goal posts are always moving and there's always opportunity to improve as a result.

Diversity

When people see the word 'diversity', I believe an assumption is often made that this relates purely to ethnicity. Diversity is much broader than that. It also includes age, religious beliefs, gender, sexual orientation, and more. In the context of the service desk, there are many reasons why having diverse teams will be of benefit. For example, the increased likelihood of a greater understanding of the organisation's customers – staff with similar backgrounds can help promote understanding across the business. By leveraging teams with broad diversity, effective problem solving becomes easier through a wider experience pool that can lead to new and innovative ideas.





Employee happiness

You've heard the quote "happy employees, happy customers". I'm not entirely sure who coined the phrase, but it's common sense, right? If an employee is happy, they're more likely to provide a good service, a good experience, a good impression to the customer.

So how do you get happy employees? And more importantly, how do you keep them happy? First thing is to not fall into the trap of thinking that money solves all problems. **A recent study by Glassdoor.co.uk suggests that salaries don't have a great impact on employee satisfaction.**

The study continues, suggesting that the two most impactful factors on employee satisfaction are the organisational culture and values, along with the prevalence of career opportunities.

Things to think about include: What career opportunities are available to people in the service desk? How can you enhance their existing skills and capabilities? How engaged are the team members with the organisation as a whole?



Feedback

You've resolved an issue for a customer and they've responded to a quick survey to say they're satisfied with the service, a job well done. That's why we collect feedback, right?

Feedback is about so much more than being used as an indicator of the satisfaction rating for a single interaction. Used appropriately, feedback data can be a priceless source of information that can help shape your improvement initiatives, act as an early warning system for potentially damaging changes in perception, and much more. Mature service desks will have a customer experience program in place, where feedback is captured, analysed, contextualised, and used to drive effective decision making.

Governance

A service desk may have adopted many practices, processes, and procedures that are proving very effective. The likelihood is, that they'll only be effective over a certain period of time. As time goes on, as user expectations shift, as ways of working evolve, the practices, processes, and procedures that once served a purpose may start to stagnate, unless they're effectively governed.

Ensure that all written documentation for things like processes and procedures are version controlled. Regular reviews should take place, at least annually, with a view to measuring their effectiveness. These reviews will provide an opportunity to detect any ineffective processes and/or procedures. The outcomes of these reviews will further provide opportunity for improvement.

Health and wellbeing

Since early 2020, organisation's across the globe have been forced to adapt – whether they were ready to do so or not. Naturally, service desks – as the windows into their respective IT organisations – have felt the strain with massive changes to ways of working. I remember talking to some friends who run service desk teams back in March/April of 2020 who were reporting tenfold increases in ticket volume.

Health and wellbeing isn't a new concept, but despite that it's something that can often be an afterthought – something that is reactively attended to. The service desk environment can notoriously be a busy place to work, but it doesn't have to be a struggle. With the right balance and approach to people's health and their wellbeing, service desk roles will be fulfilling, enjoyable, and rewarding.



Things to consider when looking to assess and mitigate against the adverse impact of health and wellbeing is to implement policies that protect against burnout, have members of the team become trained and recognised as mental health first aiders, foster a culture of positivity, teamwork and collaboration.

Intelligent disobedience

This could have easily been incident management. Although, there's plenty of other great content out there covering it.

I cannot really pinpoint when I first discovered this concept from the esteemed Ivor Macfarlane, but I've definitely embraced it. Intelligent disobedience is a notion that empowers staff to make decisions based on the information that's available to them and reach the best possible outcome for all parties. At the service desk, for example, this could allow analysts to break away from a generic process, procedure, or rule, if it's deemed that the outcome would be favorable to the customer, without being damaging for the service desk.

Imagine you have a service desk with a separate desktop support team. Procedures dictate that, for any 'desk-side' visits required by employees to fix an issue, a ticket must be escalated to the end user support team via the service desk. You get a walk-in from a senior manager who explains that they need a new keyboard, as the original one has bit the dust. The desktop support team members are stretched because a team member is sick and another member is away for lunch. A person at the service desk is available and able to competently deal with the keyboard replacement, but procedures say it needs to be completed by a member of the desktop support team. You've probably been frustrated by similar situations in the past. By applying intelligent disobedience, you can enable a mechanism to work-around a situation where a procedure proves prohibitive to providing good service. (Try saying that last sentence out loud after a glass of wine or two..)

Journeys

For some reason, this word gets a bad press. You can almost hear the audience groan whenever it's mentioned at a talk, conference, webinar, or such. As a result, I've found myself trying to find other ways to describe 'the journey a customer takes when engaging with IT' – but – it's just a word right? A word that works pretty nicely. Is there a better one? I don't know. Please get in touch!

I've seen many instances of service desks implementing interaction channels like self-service, live-chat, and such without ever involving the users that use them. As a result, it ends up being great for the service desk, it ticks their boxes, but customers may find issue with it, for example: it may be cumbersome to navigate, the language may be unfamiliar, etc.



Whenever a project is considered that will impact the way a customer interacts with the service desk, you should solicit the customer's input. It doesn't have to be every customer, but a starting point might be to put together a diverse customer focus group and bring them on that journey with you. The end result will be a solution that works for the customer AND the service desk.

Knowledge

I think sometimes cultivating and maintaining knowledge can be perceived to be a 'boring' part of what we do as Service Managers. It shouldn't be. Knowledge is one of an organisation's most valuable assets.

Effective knowledge use is all about the 'convenience' of the information that is presented to the user. By convenience, I'm referring to information being available to the right person, in the right format, at the right time, and at the right level. For example, an online knowledgebase article covering password resets is unlikely to be helpful to a user if they have to login to view it.

Knowledge is something that will be built up over time. If you're just starting out with knowledge management, it's not something you're going to get instant results with overnight. However, it's absolutely worth putting knowledge on the table when looking to improve the service desk, because it feeds and supports so many others of support, for example, self-service.

Learning

It's okay to make mistakes. They happen. How you handle and address a mistake can have a big impact on you and your team. You want to avoid mistakes being repeated. Treat every negative outcome (and positive!) as an opportunity to learn. If the outcome is negative maybe ask yourself: How can I avoid that happening again? What could I do differently next time?

For positive outcomes you may ask yourself: Why was this successful? How can I ensure the outcome is repeated next time round?

There's a strong link here with continual improvement. Although, I believe this is a more direct approach. If you haven't already got something in place, create a procedure that starts a review process whenever a mistake is made. This is absolutely not about apportioning blame, and that needs to be stressed. It's about creating an opportunity to plug a potential chink in the armor. Is there a process that doesn't quite work as intended? Is there a flaw in the software provision? Is there a skills gap?

By adopting a culture of learning instead of a culture of blame, teams will perform better, work smarter, and ultimately be happier in their roles.



Mission

The mission statement is the service desk's reason for existing. Why is it there? What does it do? What is its purpose? It may seem like something that's quite simple – in the context of this blog, it arguably is one of the more simple things to implement if you haven't already done so. That said, even if you do already have a mission statement, it should be reviewed periodically to ensure it's still effective and carries weight.

Aim for a service desk mission statement that is aligned with the vision of the organisation. It should reflect the service desk's role, it should give the service desk an identity, but also capture the service desk's contribution to the organisation's success.

Networking

I talked a little bit about this on a recent podcast – The Service Management Social. I think networking is a really effective tool that enables a person to broaden their knowledge by giving more exposure to the way other people do things. Okay, granted, the world of IT service management (ITSM) may at times have a feeling of 'the same old faces', which can be a little intimidating, but my career trajectory really took off once I opened up to attending conferences, listening to experts who have overcome similar challenges, and engaging with peers.

The service industry is absolutely massive, of course it is, but let me just say, when attending a conference and listening to a practitioner explain how they overcome their organisation's own service challenges – when they ask the audience 'Does this sound familiar?' – pretty much every hand in the room goes up.

For the last 12 months and in the near future, conferences, events and the like haven't been able to run. Don't let that stop you from participating in discussions on LinkedIn, following websites with valuable information like this one, or joining communities such as [Wizlogs for ITSM](#).





On-boarding

At the service desk, you want new staff to be running at an optimal level as soon as possible. To achieve this, you should aim to create an on-boarding plan for new starters that ensures they feel valued, that the company culture is understood, that the appropriate training is delivered, and that exposure is gained to the wider organisation. The on-boarding plan should be periodically evaluated to ensure that it still meets its objectives, for example, bringing new starters up to optimal levels as soon as possible.

I've coupled this A-Z success tip with the onboarding of customers too. If you're a service desk within a Managed Service Provider (MSP), your new customers may be the new business that your organisation wins. The same principle applies, as with onboarding new staff. You'll want the new customer to be receiving optimal service as quickly as possible. This could be by efficiently using self-service facilities, your own service desk's understanding of the organisation, etc. If you're an internal service desk providing support to a single organisation, your new customers may be the new employees that join the organisation, outside the service desk. Again, you'll want them to have a good understanding of how to get the best out of the service desk. By having the appropriate plans in place, this will help foster great first impressions and great relationships.

Promoting the service desk

The service desk once used to be considered the 'ugly duckling' of IT, a necessary evil, if you like. A lot of work has been done over the last 5 years or so to change that perception. Not only is the service desk a place that provides brilliant career opportunities, it's also the voice and window of the IT department to the rest of the organisation, and vice versa. You want the organisation to know about the service desk, what it has to offer, the value it adds, how it contributes to the organisation reaching its goals.

To achieve this, the service desk needs to be promoted. There are all sorts of ways that service desk promotional activities can take place. For example, newsletters, focus groups, town halls, etc. The most successful promotional activity is arguably members of leadership teams articulating the value of the service desk throughout the organisation.

As a direct result of successful promotional activities, you can expect an increased understanding, awareness, and adoption of the services that the service desk provide.



Queue management

It's really difficult to work proactively if you're only ever treading water. You shouldn't aim to be keeping your head just above the water, but instead, you should aim to be out of the water altogether. If you're not careful, a queue of incidents and service requests can quickly spiral out of control.

As someone who has previously worked on the service desk, I can tell you that checking in to work every day to be met with a massive backlog of work can be really demoralising.

Ways to reduce backlog include:

- Analysing the data to understand if there are any common requests that can be addressed through; automation, self-service, training
- Routing specific ticket types to the relevant resolver groups faster
- Keep staff motivated and celebrate success.

Relationships

A big focus of any strategically thinking service desk should be on the relationships it has with different stakeholders and stakeholders groups within the organisation. Cultivating positive relationships will bring about many benefits, such as:

- Collaboration across different areas of the business and with suppliers
- Stakeholder influence
- Increased trust and awareness
- Steering the ship in the right direction.

Relationships are about more than just something that need to be managed within an organisation. Successful service managers and service leaders will be experts at creating, developing, and nurturing effective long-term relationships, with just about everyone they meet. It's a cliché, but business is all about relationships, and relationships are built on trust. How many times have you seen or heard about a business to business transaction taking place because of an existing relationship? Whether that's someone you trust making a recommendation about a software vendor they've had experience with, or a recruitment consultant they've successfully engaged with? Further still, how often have you seen someone land a job because they already knew someone else who was able to make a recommendation? Although, in this context, it's more of a personal attribute, if everyone working within the service desk environment is aware of the benefits of building effective relationships, it can help to foster and create a culture of positive engagements. If there's only one takeaway from this Service Desk A-Z, make sure it's cultivating effective relationships.



Strategy

It's very easy to get stuck in the weeds in the service desk environment. Thinking strategically is about being able towards long-term objectives and producing plans to support the overall aim of the organisation.

A service desk strategy should support the service desk mission (it's reason for being/purpose) and underpin the organisation's overall strategy. Further weight can be given to a service desk strategy by incorporating Critical Success Factors (CSFs), that are in turn underpinned by Key Performance Indicators (KPIs). Think of the service desk strategy as supporting the mission in a way that describes and lays out a pathway of exactly how you're going to do it.

This approach can help service desk staff to feel empowered, valued, and most importantly, be able to understand how they contribute to the success of the service desk and the organisation.

Training

Too often training is associated with upskilling, and as a result, organisations may believe that this is an unnecessary cost. Organisations may look to internal subject matter experts to pass on their knowledge and wisdom to other team members – something that would be happening naturally in a successful service desk environment – instead of procuring training courses.

There are many more benefits to training than simply increasing your knowledge. For example, by investing in the training and development of team members, it's proven that this helps to increase employee morale and overall employee satisfaction levels.

Other benefits include:

- Creates a common language
- Support succession planning
- Improved staff retention.

You'd ideally have a training and development plan in place for every member of the service desk team, which aligns with the requirements of the organisation, yet also incorporates the personal preferences of the employee.



User experience

I often refer to the user experience as 'the last 5%'. What I mean by that is, you can spend hours and hours developing the 95% of practices, processes, procedures and such, that the user never sees, however, by not giving appropriate attention to the 5% that the user does see, you risk all that effort being for nothing. The customer will not be concerned with the amount of effort that has gone on behind the scenes, but they will be concerned with and remember the experience they had when interacting with the service desk.

Care and consideration must be given to any part of service that the user interacts with, to ensure that their experience is a good one. The trickiest part of getting the user experience right is that experience is of course perceptive. Expectations will differ from person to person, and understanding and meeting those expectations will take time to get right. I'd recommend reverting to the 'Knowledge' and 'Journeys' tips in this A-Z for good starting points when looking at tackling the user experience.

Value

Some may consider this to be a bit of a buzzword, and, I can see why. Within the ITIL 4 publications, it crops up pretty much everywhere. The service value system, value chains, co-creation of value, etc.

I was invited to take part in a podcast recently where this topic came up, and a fellow participant asked – "What has everyone been doing in service management if it wasn't trying to create value?" – they have a point!

Essentially 'value' is the outcome of all your hard work. The end result. All of the things you apply to your service delivery, the practices, the principles, the governance, etc., they'll determine just how much value is derived.

ITIL 4 introduces the idea of value co-creation. For me this is quite simple, the outcome you should always be aiming for, is an outcome that provides 'value' for everyone involved.

It's really easy for value to be one-sided. If we take my earlier point under 'User Experience' regarding the 95% of the stuff that happens behind the scenes that the user doesn't see, there's no real value there for the user on the surface. Users will start to see value when their needs are met. To get this right, it'll require collaboration between the service provider (for the purposes of this article, the service desk) and its users. The collaboration effort between the service desk and its users shouldn't be a one-time thing either, this should be a continuous, on-going effort.



Who, what, when, where

We've got the 'four dimensions of service management', 'the seven guiding principles', 'the three ways', and now let me introduce you to the 'Four Ws of Convenience'. Fingers crossed it catches on...

I've already touched on convenience in this A-Z under 'Knowledge' but want to explore it a little further.

Giving consideration to the convenience of a service to the user, in my opinion, is the key to ensuring a great user experience. If you've covered the 5 Ws when a user interacts, then you've done a great job.

- You'll want to know Who is using the service. This'll help to determine things like the appropriate channel to make available for service desk interactions and the best format to present the information in.
- You'll want to know What it is that the user needs assistance with. This will help to shape things like the appropriate response, actions and/or next steps.
- You'll want to know When the user is likely to need assistance. This will help feed into decision making around workforce and rota management, service availability, etc.
- You'll want to know Where the user is geographically. This will help shape things like the appropriate response, service availability, language, local governance, etc.

If all of these things are known, then catering for the user's needs and acknowledging their personal preferences in the process, becomes a lot easier.

XLAs

Experience Level Agreements (XLAs) are typically used to measure the outcomes and value of a service from the perspective of the user/customer, whereas the traditional Service Level Agreement (SLA) will measure the quality of service, from the service provider's perspective. There's a feeling among many thoughts leaders in the service management space that XLAs are a better measurement of success because they capture the user's experience and perception of the service, ensuring that the user becomes the centre of decision making.

Using SLAs alone can, on the surface, provide a picture that shows healthy statistics. Common metrics such as time to answer, first time fix, and time to resolve may all be positive. But does that tell you whether or not the users are happy with the service? The service managers might be happy that SLAs are being 'met', but if the users are complaining, they won't be happy for long.



I believe a blend of SLAs and XLAs should be used to provide a complete overview of a service desk's success. SLAs will provide insight with typical indicators on service quality, with XLAs providing context and narrative around the users perception of the service being delivered. This allows organisations to potentially pick up on areas of service that, whilst they're performing well, users simply don't like.

You're welcome

Providing recognition where it's due is an incredibly powerful tool to keep staff motivated.

Service desks should create reward and recognition schemes for service desk staff to actively encourage positive behavior. Many organisations may struggle with this sort of thing, as it may be against company policy to 'reward' staff, however, recognising and rewarding staff doesn't always have to involve a financial incentive. Rewards could include secondment opportunities, recognition through employee of the month style schemes, newsletter, and social media features, etc.

This is arguably one of the easiest of all the tips in this A-Z to implement within a service desk environment. It can be done without any additional investment and it can have a fairly respectable impact too.

Zzzzz!

Burn out can be quite common within service and support roles, especially during periods of high demand. Recognising signs of fatigue and stress are an important skill for the service desk professional, whether in oneself or in another. That said, prevention is better than the cure, and implementing an effective and robust workforce management plan will ensure that staff avoid feeling burnt out.

The most important aspect of service to consider when implementing a workforce management plan is demand. Think of the times of day when the majority of user interactions occur, are there any patterns throughout the year, seasonal fluctuations? This will of course vary from organisation to organisation. For example: a University service desk is likely to be at its busiest during its admissions period.



Summary

Hopefully some of the considerations covered have sparked some ideas that you can apply in your own organisation. Getting any improvement initiative off the ground can be daunting, but it needn't be. Take the time to take stock of your current challenges and pain points, and work with your teams to create a plan to overcome them.

Avoid taking on too much and creating too much change at once. I'd recommend tackling improvements bit by bit. You might elect 'champions' within your teams to have ownership over a particular part of an improvement plan. You'll find the best success when involving your teams (and customers where appropriate) at an early stage.

I've enjoyed putting this A to Z together and I hope you've enjoyed reading it.

What are the challenges within your service desk that you'll look to tackle first?

