

Tools of the Trade: Optimization at the Service Desk

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Those of us involved in service support are acutely aware of the maturing of the help desk, now more appropriately referred to as the Service Desk. Contemporary Service Desk operations demand much in the way of technology and people skills for Service Desk personnel. The Service Desk is a key investment area and often a starting point for broader Information Technology Service Management (ITSM) initiatives.

Investment in this area is strong for 2009! It makes sense to optimize support operations through the best use of process, people and technology.

The role of the Service Support Analyst extends much beyond problems and incidents. And the Support Manager is now much more accountable for quality support and performance transparency. As Enterprise Management Associates (EMA) has written, the Service Desk has become the "nucleus" for service management activities that reach out to most ITSM domains including Asset Management, Configuration Management Systems (CMS), Change Management, Knowledge Management, the Service Catalog and more.

This expansive set of responsibilities is putting increasing pressures on the service support team. As in sports, the best defense is an offense-great staff, adequate training and robust Service Desk tools to support a highly automated operation.

Tools of the trade, or so we say, include Automation, Integration and Workflow designed and implemented to ease the burden on individual staff members while improving service quality. Not all tools are the same and not all solutions integrate in a way that is most helpful.

Cautious advice is "*buyer beware*" as you evaluate toolsets to be sure functionality is there to support advanced operations for your particular technology environment.

For some, the Service Desk evolution can seem like an academic discussion. That is a mistaken perception and avoids the chance to capitalize on increasingly sophisticated technologies and improve the role and cost structure at the Service Desk—it's a very "roll-up-your-sleeves" pragmatic opportunity.

Automation, Integration and Workflow-when used collectively-can help the Service Desk to make big strides in smoothing out the operation and leveraging the skills of technical staff members. How can these tools of the trade be used to make meaningful gains in efficiency and service quality? Some possibilities are:

- **Populating problem and incident records**

Enabling the pre-population reduces inconsistencies in data and puts adequate information in the hands of support staff on the front-line. User directories have been a target for this type of functionality for many years. Strong *integration* capabilities can increase the amount of data that no longer has to be manually entered by the analyst. This can include asset information, network or systems status and in some cases automatically trigger display of possible solutions from the knowledge base.

- **Capturing resolution details for knowledge articles**

Knowledge Management is a domain in its own right. Properly done, there is a lifecycle to capturing and managing knowledge such that it is available when needed, in a form that can be used and aged out of the system when no longer useful. Service desk tools, remote support capabilities and supporting *workflow* engines can assist to ease this process by capturing knowledge as close to its source as possible. *Automating* this process by capitalizing on the audit logging capabilities jumpstarts the Knowledge Management process. Additionally, *integration* with Knowledge

Management tools combined with *automation* can trigger removal or archiving of information that is no longer useful.

- **Streamlining self-service operations**

There are many touch points that are useful for streamlining self-service operations. Many enterprises choose to develop their own Web-based portal to drive users to as a starting point for self-service activities. Once here, linkages must be created for creating trouble-tickets, linking to chat capabilities in an *automatic* way and initiating connection to knowledge and remote support technologies.

- **Pushing dashboards and management reports to executives**

Nothing is more important than proving value and demonstrating results to executives. One way to do this is to use *automation* to push management level reports and dashboards to key C-level staff members on a regular basis. This is not something IT management wants to have fall through the cracks. If worried about unknowingly sharing negative results, most solutions can have filters to create an exception process based on your criteria.

Most use cases will require the work of *automation, workflow and integration* to be working in concert with one another. EMA conducted an extensive study on the service desk earlier this year called *The Aging Help Desk: Migrating to a Modern Service Desk*. While this study was not specifically about automation, it did probe participants about the importance of *Automation, Integration and Workflow*. Network, Application, Systems and Security Management were the most critical integrations identified by participating users when looking at technology domains. Change, Asset and Service Catalog integrations are also important.

Many organizations are focused on ITIL deployment and best practices. Our study shows that 23% are planning to adopt the ITILv2 processes on top of 40% that already have done so. Another 51% have plans to adopt the ITILv3 lifecycle approach with 13% already having done so.

Yet, anecdotally, EMA knows that many organizations are putting a box around ITIL scope and not assuming that the enterprise should fully adopt all disciplines. We have moved clearly beyond understanding that best practices are valuable. Now, enterprise culture is focused on dissecting the value of what is best for the organization.

This approach is relevant to automation and integration as well. It is not feasible to automate everything all at once or perhaps even at all. The same is true about integration-there is interest in integrating solutions from silo-based technologies to accounting systems-IT must choose its priorities wisely.

Summary

The trick in any endeavor is to be able to demonstrate results early. When utilizing technology to build bridges with limited staffing, it will not help to try to tackle all that could be achieved with *Automation, Integration and Workflow*. Much better to look at the two or three things that can show success and ease processes in the Service Desk.

Excellence should be the focus, but excellence for priorities that make the most sense. This will vary by vertical, geography and organization.