

So you're planning a help desk?

Here's the step-by-step strategy -- with advice from those who've done it right

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Abstract

Overwhelmed by the thought of setting up a help desk? Don't panic. Many others have already done it successfully. Here's a rundown of the most important elements. We give you the dos and don'ts from the experts, along with useful help desk statistics and a listing of the types of automated help desk software currently available. *(3,100 words, including two sidebars)*

Planning a new help desk isn't easy. To design, activate, and administer an effective help desk support function requires both good planning and professional implementation. To start you off on the right foot, we have advice from the experts, beginning with this list of eight important steps for initiating a successful help desk:

Step 1. Determine whether or not you really need a help desk function. You'll know it's time for a help desk when your technical staff can no longer respond to support requests. This point is often reached when the proliferation of PCs, workstations, internal networks (LANs or intranets), and multivendor computing platforms within the company leads to increased end-user demand for assistance. When this assistance requires complex problem analysis to resolve increasingly sophisticated computing problems, a professional, well managed, dedicated help desk function is a necessity.

Peter McGarahan, executive director of the Help Desk Institute (HDI) based in San Francisco, CA, notes that "telltale signs that a formal, dedicated end-user help desk is needed include: heavy turnover of technical staff (indicating burnout), end-user unhappiness with MIS, and reduced productivity (resulting from users spending too much production time resolving their own computer-related problems, or helping others resolve theirs)."

If any of these conditions are present, it may be time for a companywide help desk function. At this point, you should form a help desk planning

committee -- consisting of company executives, MIS personnel, and users -- to develop and design a formal help desk operation.

Step 2. Plan the help desk service level. Early in the planning stage, you must decide what level of service the help desk will provide. A very basic help desk answers users' phone calls, dispatches field engineers, and tracks problem resolution. Higher level help desks perform the function of a low-level, problem-solving service bureau by asking callers basic problem-solving questions and walking them through simple procedures (like reloading an applications program, retrieving "lost" e-mail, or resetting a password).

Still other, more advanced help desks are staffed with highly skilled network, hardware, and software analysts who are capable of using remote tools and expert system packages to examine a problem and resolve it.

In this service-level planning stage, discuss users' perceptions of help desks, and what they might expect from one in your company. Then, depict what its charter and its functionality will be. It is extremely important that the help desk's service level be understood by potential users, because failure to meet user expectations will doom the project.

Step 3. Decide what to support. With the service level decided, it's time to tackle systems and equipment issues. Define the systems, hardware, applications software, and networks that will be supported. Here, user needs, company priorities (e.g., critical applications, user development, etc.) and budget constraints must be weighed against an ideal 100 percent support environment.

Step 4. Make the outsourcing versus in-house decision. Investigate the benefits and disadvantages of creating an in-house facility versus outsourcing the help desk. You have three viable options for the design, operation, and management of computer help desk operations. It can be created, run, and managed in-house, be completely outsourced, or combined into a hybrid (shared) operation between in-house staff and an outside service vendor, like Sun Microsystems.

Sun and other large support vendors provide modular help desk services that are customized to each client's needs. These services can be tailored to address your entire multivendor, multiplatform computing environment. In a completely outsourced situation, the help desk vendor manages all problem resolution -- either at your site, or from a designated remote help desk facility. In a shared help desk setup, the vendor manages call-response and problem-isolation, turning problem resolution over to your on-site people or a designated service vendor.

Debbi Behrman, Sun Microsystems's worldwide business manager for help desk, security, and consulting services, says that in addition to downsizing, an enterprise might outsource the help desk function due to "a shortage of internal expertise, or a decision to confine resources to their core business. Also, if support for multiple locations is needed, sometimes a remote help desk seems more appealing." Behrman adds that the outsourced help desk is not always a cost saver: "Initially, with outsourcing a help desk, a user expects to buy economy of scale and to lower operational cost. But, often, by giving up control to an outside vendor, cost savings dissipate."

Step 5. Define staffing and operations. Next, after the internal versus external decision has been made, you can address staffing and training requirements, hours of operation, and specific equipment, networks, and applications support issues. Costs will also be addressed in this planning step. Cost will play a major role in determining the final level of service and scope of support offered.

If you've decided to implement an external help desk, internal staffing will be minimal -- perhaps just one low-level in-house technician to direct requests and oversee the help desk's response. If you're staying in-house, you must recruit or train a help desk staff skilled in troubleshooting and problem-solving techniques and familiar with the specific network environment and the software packages being used. Quick problem resolution depends on specialists who know the network, hardware, and software.

Before completing this step of the planning process, all parties on the committee must agree and be willing to "sign off" on the proposed scope and service level of the help desk. In this way, company management, MIS personnel, and users all know what to expect from the help desk and will better support and be supported by it.

Step 6. Plan to make the help desk extremely easy for users to access -- preferably with just one phone call. After the usual logging-in data (such as user name, department requesting service, computer node, and software being used), the help desk should be able to ask the caller to describe the problem, then walk him or her through the solution.

Step 7. Develop a procedure for gauging user satisfaction with the help desk. You should implement a formal plan to provide feedback to company management on a regular basis. Periodically -- no less than every six months -- you need to review operations, train personnel, critique response times, and collect user assessments.

Step 8. Enable management to quickly track a problem, from initial call to full resolution. You need to tally data detailing the number of calls, the time needed to resolve a problem, and how many calls were "closed" by the help desk versus how many were escalated to outside support for resolution.

Pitfalls to avoid

According to HDI's McGarahan, the most frequent mistake made by those initiating a new internal help desk service is that they understaff it -- "They don't correctly anticipate the volume of calls the help desk will handle." Another mistake is that planners get carried away with automation. "While it certainly has its benefits, people generally dislike speaking to machines. People are negative on this," McGarahan says. "Technology is not a silver bullet -- it's a combination of people, technology, and organization that makes it all work."

Running a first-class help desk function incurs a lot of hidden costs, warns McGarahan. "It's easy to underestimate the costs associated with a help desk. For example, start-up costs have to include staffing, training, equipment, phone services, software, and floor space. And remember, staffing must include back-up people, and training is an on-going expense."

(For more dos and don'ts, turn to our sidebar, "[Tips from experienced help desk executives](#).")

Help desks -- what's going? Some useful stats

Each year, the Help Desk Institute (HDI) -- a networking forum for help desk professionals with over 7,000 members worldwide -- publishes the *Help Desk And Customer Support Practices Report* which provides reliable insight into the current and future operations of help desks across North America. This report provides valuable information for anyone involved in the planning stages of a new help desk. (The 74-page booklet is available to HDI members for \$25, and to non-members for \$99.95.)

A peek at HDI's latest survey* reveals that the help desk function commonly reports to a company's IS, IT, or MIS executive. A sampling of the data collected on HDI member companies reveals that:

- Of all help desks, 44% offer support seven days a week; 50% provide service six days a week.
- The most common types of problems resolved by help desks were applications software (35%), hardware (21%), data communications (14%), and miscellaneous services (e.g., security and passwords, 12%). The remaining user requests involved technical support for operating systems (8%), databases (4%), voice communications (3%), and other services (4%).

- The average help desk now has a staff of 20 full-time equivalent employees, and the average number of customers supported is 2,021. Nearly 15% of help desk operations in the survey support fewer than 500 customers, while 52% support over 2,000 users.
- The average number of training hours for each help desk staff member is 41 per year; managers average just over 36 hours of training annually.
- Almost 50% of help desks responding to the survey are planning for their employees to become technically certified for Microsoft products; 26% are planning certification for Novel NetWare. Almost 18% of help desk employees are already CNE/CNA certified; just under 12% are Microsoft certified.
- The monthly number of calls to the help desk averaged 1,662. This includes calls from all sources (phone, e-mail, fax, walk-ins, etc.). Of the help desk service centers taking part in the survey, 15% receive less than 500 requests per month, and 25% receive 5,000 or more service requests per month.
- The average cost per service request (fully burdened) ranged from less than \$10 per request (7.6% of respondents) to over \$100 per request (0.8% of respondents). The largest segment (just over 13%) of the help desks responding spend \$10 to \$19 per service request.
- Of help desk management surveyed, 70% used a computerized call logging system; 52% did *not* track response and repair times for hardware repair personnel.
- When asked if service requests from users to the help desk are on the increase, 74% of respondents say yes; 18% say calls are about constant; and 8% say their help desk service calls are decreasing.
- On average, the typical help desk operation resolves 79% of technical support requests. About 15% of requests are assigned to other departments for satisfactory resolution, and just 6% are escalated outside the company (that is, sent to a service vendor for a solution).
- Nearly one third (29%) of all help desk organizations reporting stated that support staff spend 90 percent to 100 percent of their time on the telephone; 7% said telephone duty is limited to 40 percent of a work day. The overall average for telephone time was 80 percent of the work day.

The survey also includes pertinent data on the technologies now employed and planned, staff training and recruitment, service request profiles, and support activities offered at help desks.

Help desk trends

During the design phase, take into account the inevitable expansion of the help desk's role. As the trend toward enterprisewide nets continues to explode, automation must play an increasingly larger part in help desk services. So plan accordingly.

The affordable entry-level pricing of many expert systems packages, along with increased performance levels, provides the opportunity to advance many help desks into full-support functions. Many have already added extra services like user liaison, training, and documentation tracking to their original problem-management and call-tracking functions. Additional automation will allow your help desk to efficiently and cost-effectively take on these new tasks.

Whether your help desk operation is to be low-level (basic dispatching and call tracking), medium-level (first- and second-level troubleshooting), or high-level (remote tools and expert systems resolve all levels of reported problems), it will be easier to use and manage if you have automated systems for dispatching, call servicing, and problem resolution.

(See the sidebar, "[The automated help desk](#)" for more on help desk automation.)

The first priority of the planning and design team must be to create a help desk that's easy to access and use. If it isn't, users will bypass it. If you can clearly demonstrate your help desk's benefits, first to company management then to your users, they'll get behind it -- making it a sure success. ■

* The survey was conducted in May 1997 by the Help Desk Institute. The Institute mailed 5,659 surveys to members in Canada and the United States; 819 completed surveys were returned. Percentages depicted have been rounded to nearest whole number.

Resources

- [Help Desk Institute](http://www.helpdeskinst.com) <http://www.helpdeskinst.com>
- [Autodesk](http://www.autodesk.com) <http://www.autodesk.com>
- [Help desk resources listed at Yahoo](http://www.yahoo.com/Business_and_Economy/Companies/Corporate_Services/Customer_Service/Software/Help_Desk/)
http://www.yahoo.com/Business_and_Economy/Companies/Corporate_Services/Customer_Service/Software/Help_Desk/