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New Service Desk Success in 8 Steps

It's pretty common for Users to go around a new Service Desk, but what do you do when IT groups go around the new Service Desk too? Lack of trust in a new Service Desk cuts both ways and success depends on winning the hearts and minds of customers and internal IT groups – and it takes just 5 minutes...

By Janet Kuhn

As a Project Manager at a large medical services organization we implemented a modern Service Desk with phone access and self-help (letting Users enter Incidents directly in the new system.) Our technical groups were looking forward to the new Service Desk as a way to reduce interruptions to their daily work.

However, after implementing the new Service Desk, our technical support groups still got calls directly from Users. It seems many Users were uncertain about what constituted a reportable Incident, and were also uncertain about how to contact the Service Desk or use the self-help feature.

Then we found out the IT side had concerns too – our technical groups did not want to lose their connection with Users. They had worked hard to build bridges with the business, and they did not want to destroy them by refusing to take support calls.

To resolve these issues we created the "Five-Minute Rule" to make Users more comfortable with the new Service Desk and teach them the benefits of going through, instead of around, the Service Desk. Ditto for our technical groups.

Following I introduce the eight key steps that make up my "Five-Minute Rule" that you too can use to ease the introduction of a new Service Desk into your own organization.

The Five-Minute Rule

The structure of these eight steps is very important, and when followed carefully teaches both Users and IT that they will not “lose” their relationships, and because IT is better able to focus on the resolution of an Incident or Problem, the quality of those relationships increases.

The “Five-Minute Rule” lets a user call and discuss the Incident with a Technical Analyst within a technical group for a maximum of five minutes, concluding with either the user or the Technical Analyst opening a Service Desk ticket.

1. Receive the User call.

2. Ask User if he/she has logged the call with the Service Desk.

3. If Yes, ask the User for the ticket number and assure them him/her that keeping track of that number is the key to getting the issue resolved. [This reinforcement is a key step and you should not skip it.]

4. If No, ask him/her to log the call with the Service Desk. Explain that the Service Desk will:
   - Assign a trouble ticket to make sure the call is not lost;
   - Keep track of the call so that if a Technical Support Analyst gets called away for another purpose, the Service Desk always knows where the call is;
   - Issue automatic warnings to the Service Desk and Technical Support groups if a ticket is open for longer than the agreed service levels;
   - Assign the call to the correct Technical Support Analyst because sometimes multiple problems contribute to the interruption of the service;

5. If the User still hesitates to log the Incident with the Service Desk:
   - Sign in and log the Incident for them, referencing your name and a summary of the conversation in the text field;
   - Give the User the ticket number and explain that although eventually you may be assigned to work on the Incident, this will protect the User for all the reasons stated above

6. Try to find out why the User called Technical Support directly;

7. If the Incident prevented the User from using the on-line Service Desk feature, give them the Service Desk’s telephone number for follow up;

8. If they did not know who to call or did not want to call the Service Desk, explain

that there are new procedures, and refer them to their supervisor – or your supervisor, if necessary.

Be pleasant, but firm, and assure the User that the new procedures will help everybody work more effectively and efficiently.

Summary

Had we allowed Users and Technical groups to continue to bypass the Service Desk, the organization would not have received the full benefit of a mature Service Desk and Incident Management process.

However, had we hardened our stance on allowing the Technical groups to accept calls directly from the Users, we might have lost "buy-in" to the new processes by the Technical groups, as well as the very essence of trust and communication between the Users and the IT department that we were trying to build.

During the genesis of our new Service Desk this procedure was highly effective. The "Five-Minute Rule" ensured that no matter how a User placed a call, the call was entered into the Incident Management system. Equally as important, the Five-Minute Rule allowed the Technical groups to assume responsibility for managing the necessary adjustments to the new environment.

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