HELP DESK BEST PRACTICES-WHAT FEATURES AND FUNCTIONS YOU SHOULD LOOK FOR IN HELP DESK SOFTWARE

Why are Help Desk Best Practices important?

What features and functions in software will help you implement best practices?

Important questions to ask to determine if your software supports Help Desk Best Practices

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HELP DESK BEST PRACTICES-WHAT FEATURES AND FUNCTIONS YOU SHOULD LOOK FOR IN HELP DESK SOFTWARE

The following is a summary of Help Desk Best Practices from the following three authority sources: the Information Technology Infrastructure Library (ITIL), the Required Practices for Organizations (BS15000) and the Help Desk Institute (HDI) Best Practices Standards for Certification.

> **"BS15000 provides a baseline against which the internal IS organization can demonstrate to the business that its service delivery processes represent "Best Practice" and are performing well". Gartner Group**

To improve, an organization must assess its current practices against those used in other organizations, or "best practices." Simply put, a best practice is the most effective way to get something done. These practices, processes, and procedures have emerged as proven models for the majority of organizations. However, best practices are dynamic, evolving over time to adapt to changing needs. Periodically, new methods, models, and technologies arise, augmenting or replacing the existing best practice with a new one.

Help desk organizations must assess their competencies, find areas for potential improvement, and grow. A list of best practices that can be implemented and used in help desk software serves as the starting point for such an evaluation and improvement process. Use this list to reconsider what you are doing and why, and what you should be doing and when. Balance each potential change in a practice, procedure, or technology with a cost/benefit analysis.

Help Desk Best Practice: Perform Customer Satisfaction Surveys on a Regular Basis

Customers will always let you know when they are completely dissatisfied with your service. However, daily customer satisfaction surveys performed by your call tracking software provides valuable information from a broad sampling of employees. A continuous customer satisfaction survey process improvement philosophy will drive customer satisfaction and loyalty to even higher levels.

According to a 2013 Help Desk Institute Survey, 21% of their members send customer satisfaction surveys with every service request. This is an increase of 40% from the 2009 survey.

Frequency	**Response**
Continuous Customer Survey Sampling	21%
As Needed Customer Survey	17%
Annual Customer Satisfaction Survey	14%
Do Not Conduct Customer Satisfaction Surveys	13%
Quarterly Customer Satisfaction Survey	8.5%
Daily Customer Satisfaction Survey	8%
Weekly Customer Satisfaction Survey	8%
Semi-Annually Customer Satisfaction Survey	8%
Monthly Customer Satisfaction Survey	6.5%

Source: HDI Practices Customer Satisfaction Survey 2013

IMPORTANT QUESTIONS

- In ten seconds or less, can you measure overall customer satisfaction as follows? In ten seconds or less, can you also review survey comments made by customers?

By Service Group
By Analyst
By Call Category
By Root Cause

Further by time:

This morning
Yesterday
Last Week
Last month

Further by:

Region
Country
Office
Department
Customer

Create Your Own Customer Satisfaction Surveys or Use a Default

This provides for creating your own customer satisfaction survey greetings, questions, answer formats and values including follow-up thank you notes. It is important to be to able to generate your own custom customer satisfaction surveys. Customer satisfaction surveys that can be set up with text, lists, text inputs and radio buttons allow for the most customization. A default survey will also help you get started right a way with surveying. An associated customer satisfaction report allows for quickly viewing the survey results.

Customer Satisfaction Rating Alerts

This provides for setting minimum levels of customer satisfaction ratings that trigger alert notifications if levels are not achieved. This allows quick remediation.

Customer Satisfaction Survey Frequency and Survey Exceptions
This provides the capability to survey each customer every X service requests, but no more than Y service requests over Z time interval. System Administrators should be able to place some

customers on a survey exception list so that they do not receive surveys. Senior executives sometimes do not want to complete customer satisfaction surveys. Some employees who frequently use the help desk many not want surveys each time they call the help desk.

Personalized Customer Satisfaction Surveys
This provides the capability to include a digital photograph of the person who closed the service request along with the customer satisfaction survey that is sent via email. This allows employees can view a picture of the person that resolved their problem. This helps connect employees to the help desk department and puts a "face" on the people in the department.

Choice of Customer Satisfaction Survey Delivery Method
This provides an option for the customer satisfaction survey to be sent either in an independent "customer satisfaction survey" email or integrated with the standard close service request email notification. The customer satisfaction survey will display as a nice sharp looking HTML document directly in the email. This will increase customer satisfaction survey response rates.

Customer Satisfaction Survey Alerts- "Please call me"
This provides a "check box" that the customer can check if they would like a help desk manager to call them. When checked, a manager is immediately notified giving them a "heads-up" that a customer wants to speak with them. This allows for a written record and an opportunity to more closely communicate and meet the needs of your customers.

Help Desk Best Practice: Implement a Web-Based Knowledge Base Tool

In conjunction with using a web-based help desk software system, using a fully integrated web-based knowledge base software tool is a very important help desk best practice. The greatest asset a service organization has is the knowledge of the staff. When an employee leaves the organization, they take all that knowledge with them. By encouraging and rewarding employees to document their knowledge, in a centralized knowledge base software system, it becomes available for all the staff to leverage. Independent research supports that a knowledge base will decrease call handle time, talk time, call escalation percentages, employee turnover, agent training time and increases first call resolution rates. A knowledge base software application will also increase consistency in answers and overall customer satisfaction.

When customers use a knowledge base software self-help tool, it reduces repeat calls to the Help Desk. Using a customer accessible self-help portal will reduce calls by increasing call avoidance and is a great way for your support organization to save costs. In the 2007 Help Desk Institute Practices Survey, 48% of respondents use a web portal knowledge base system. When companies employ web-based self-help technologies, 74.5% of them use knowledge base search tools!

Technology	Response
Knowledge base search tools	74.5%
FAQ’s	72%
Self-diagnostic/Self-healing	38%
Other	22%

Source: HDI Practices Survey 2013

What benefits can companies expect from a Knowledge Base and Self-Help Knowledge Portal?

Some benefits of a Knowledge Base software system correlate directly to bottom-line savings, while others are more difficult to quantify. In today's information-driven economy, companies uncover the most opportunities — and ultimately derive the most value — from intellectual rather than physical assets. To get the most value from a company's intellectual assets, Knowledge Management practitioners maintain that knowledge must be shared and serve as the foundation for collaboration. Yet better collaboration is not an end in itself; without an overarching business context, a Knowledge Base is meaningless at best and harmful at worst. Consequently, an effective Knowledge Base software system should help a company do one or more of the following:

- Foster innovation by encouraging the free flow of ideas
- Improve customer service by streamlining response time
- Boost revenues by getting products and services to market faster
- Enhance employee retention rates by recognizing the value of employees' knowledge and rewarding them for it
- Streamline operations and reduce costs by eliminating redundant or unnecessary processes

- Increases customer satisfaction since a knowledge base portal is available 24 hours/day

Source: CIO Magazine. The ABCs of Knowledge Management, Megan Santosus & John Sermacz

IMPORTANT QUESTIONS

- In ten seconds or less, can you determine which IT employees are generating knowledge records and at a very granular level can you determine if this knowledge is solving problems?
- Does your firm provide valuable incentives to reward employees for building and maintaining a high quality knowledge base?
- In ten seconds or less, can you determine what categories of knowledge employees need?
- In ten seconds or less, can you determine the quality of knowledge by user ratings and how often knowledge records were used to solve problems?
- In ten seconds or less, can you determine if an increase in knowledge records is causing an associated increase in First Contact Resolution?

FAQ and Most Frequently Used

These allow both agents and customers to leverage a list of common questions and answers in the knowledge base software application. An FAQ can easily be set-up by specifically designating that a knowledge base record is included in the FAQ listing. A Most Frequently Used listing of knowledge base records will leverage the knowledge base and help customers and Agents to quickly find answers.

Problem Solving Score- Knowledge Base Record

When a knowledge base record is used, a "Problem Solving Score" is incremented. The search engine utilizes these ratings to prioritize subsequent knowledge base search results. Reports use the “Problem Solving Score” to indicate which knowledge base records have the highest value and which may need improvement. A knowledge base software system should learn and get “smarter” over time.

User Rating Score-Knowledge Base Record

An Agent can rate knowledge base records each time they are used. The search engine utilizes these user ratings to improve subsequent knowledge base search results. Reports use knowledge base record ratings to indicate which records have the highest value and which may need improvement. A knowledge base software system should learn and get “smarter” over time.

Knowledge Base Accepts Attachments and Screen Shots

Sometimes a picture is worth a thousand words. With a good knowledge base software system, files and screen shots can be attached to knowledge base records for further documentation. Attachments that are audio and video presentations of typical “How To” questions are excellent examples. The files are indexed by the knowledge base search engine and become part of the knowledge base software system.

Import Third Party Knowledge Bases for Agent and Customer Self-Help

This provides the ability to purchase knowledge bases from third party vendors and import for use in your own knowledge base software system.

Assign security levels to knowledge records.

This provides the ability to assign a security level to knowledge base records, agents and customers. Accordingly, agents and customers can only view knowledge base records designated with the matching security level in their profile.

Knowledge Base Approval Process

All new knowledge base records must go through an approval process.

"Contact Me" option

After a customer reviews knowledge base records in a customer service self-help portal, if no records answer the query, the customer can request someone contact them. By clicking a “Contact Me” hyperlink, the knowledge base software application automatically creates a service request with the search criteria already tried by the customer. This service request also documents the possible need for new knowledge base information to fill voids.

Automatic Customer Profile Creation

When a new customer requests someone contact them, besides creating a service request, the knowledge base software application automatically creates a new customer profile.

Capability to Designate Knowledge Base Records as "HOT" Knowledge Base Records Bypassing Approval

Some knowledge base records need to be available immediately without going through the approval process. A knowledge proposer can designate any record as "HOT.” The knowledge base record is then immediately available for others to utilize. Later, if the knowledge base record is approved, the "HOT" designation can be removed.

Assign a Scope to a Knowledge Base Record
Record Scope is a field used for grouping knowledge base records for a single service desk, multiple service desks and parent/child companies.

Knowledge Base Record Redundancy Avoidance
When knowledge base records are initially proposed and also during the approval process, the knowledge base software automatically searches all existing approved knowledge base records to identify possible redundancies. This allows the knowledge bas record proposer or approver to consider these possible redundancies.

Knowledge Base Record Spelling and Grammar Checker
This provides for a spelling check on all proposed knowledge base records to maintain the usability of the knowledge base software system.

Knowledge Base Record Action Notification
As knowledge base records moves through the approval process, designated approvers are automatically notified via email.

Knowledge Base Source Tracking
Defines the source of the knowledge base record such as a service group and agent. This is used to measure who is creating knowledge base records.

Knowledge Base Record History Field
A knowledge record history field keeps a permanent record of all changes to the record as well as who did the change as well as the date and time of the change.

Search Scope can be Widened or Narrowed
If the knowledge base search results are not satisfactory, you can widen or narrow the search scope to generate new knowledge base records without having to start the search from the beginning.

Login Required-Self-Service Help Desk Portal Access
Login required gives the flexibility to store sensitive knowledge in a knowledge base that requires agent and customers to present a user ID and password.

No Login Required- Self-Service Help Desk Portal Access or Intranet Restricted Access
No login allows your customers to access your knowledge base without the hassle of having to log in. Access from a private Intranet page restricts access to only those authorized.

Search Knowledge Base from any Screen
Simply click a hyperlink that will take you directly to the knowledge base software application.

Create Knowledge Base Articles from any Screen
Useful knowledge can be thought of by Agents at any time especially when they are searching for answers or resolving a service request.

Search the Knowledge Base your own way
You can enter your question in the knowledge base natural language search engine by using normal conversational questions. Alternatively, the capability to use a Boolean search engine and enter specific search criteria such as (1) Include all these words or phrases, (2) include at least one of these words or phrases, (3) exclude these words or phrases, (4) search by record number. Optionally, you can select a category from a drop down menu.

Knowledge Base Natural Language Search, Boolean or Key Word Search

Natural Language Search & Knowledge Bases
A natural language search engine evaluates words based upon their meaning and the relative positioning to each other. For example, an exact match of a phrase would have a higher relevancy score than phrases with all the same words in different order. Good knowledge base search engines have a database of synonyms, commonly misspelled words and a thesaurus. They also perform root word stemming on knowledge base searches which take the root word and searches on the variations of that word such as adding “s” or “ing”, etc. The ability to interpret and differentiate between words that sound alike or have similar letter patterns is important. These knowledge base software functions help to better interpret the search input in order to generate higher quality search output.

Boolean or Key Word Search

- **Boolean operators**. You can refine your search with words such as AND, OR, and NOT.

- **Keyword search**. If you only know a few key words, you can begin your search with these and then refine to get closer to your goal.

Knowledge base records in a search result should be clear and concise. A search ranking score from either of the search approaches indicates the probably that this result is the answer based on your search criteria.

Tabs for Easy Viewing Knowledge Base Results
The basic knowledge view displays a summary of the related knowledge. Additional Tabs can take you do different views including knowledge base screen shots and attachments

Easy Copy of Knowledge Base Content into Help Desk Software System
Clicking a simple hyperlink to enter service request resolution information into the help desk call tracking software system will save data entry time and improves documentation. The call tracking software system should also track if you copy the knowledge base record into the service request. If this occurs, then there should be an increase in value of the knowledge base record since it helped solve a problem. This will also allow you to measure and track which knowledge base records are used.

Emailing a Knowledge Base Record to Customer
Clicking a simple hyperlink to send a customer the appropriate service request resolution will save agents time.

Simple Customer Interface to Knowledge Base
Customers can access knowledge base records from a customer interface via the Internet with a very simple user interface.

Knowledge Base Record Creation Options

- **Proactive Method** Authors can create knowledge and then place it through a validation process before it is available to all support personnel.

- **Manual Method** Subject Matter Experts (SME) create knowledge from their experience.

- **Reactive Method** An agent or a customer proposes knowledge when in the process of opening or closing a service request.

Knowledge Base Record History
The knowledge base record history field keeps track of all changes in a diary field. For example, the date, time, who created the record, who approved the record, status changes, etc. are all recorded in the knowledge base record history field.

Help Desk Best Practice: Implement a Web-Based Knowledge Base Tool with Real-time Reports, Dashboards, Metrics and Business Analytics

Knowledge Base Value Report
Report allows you to evaluate the quality of knowledge base records proposed by people in your organization. It includes information such as "Problem Solving Score," "Average Problem Solving Score," and "Average User Rating" for knowledge base records. .

Knowledge Base Usage Report
Report allows you to evaluate the quality of knowledge records based upon the "Problem Solving Score" and the "User Rating" of knowledge records.

First Contact Resolution to Approved Knowledge
This report allows you to determine if, as you add knowledge base records, there is an increase in the First Contact Resolution percent.

Knowledge Base Status Report
Report allows you to search proposed knowledge records by any status, scope or category. Drill down capability allows you to directly access a knowledge base record.

Report should offer many query options such as (1) Categories, (2) Statuses, (3) Knowledge Users, (4) Scope, (5) Security Levels, (6) Approvers, (7) Not Last Used Within x Months and/or (8) Not Last Modified Within x Months.

Knowledge Base Status Report & Approval Work Flow Process
The Subject Matter Experts run this report for their respective category. It lists all knowledge base records for approval.

My Knowledge Base Status Report
Report is for each person that has proposed knowledge into the knowledge base software application. It lists the status of each knowledge base record. Sometimes Subject Matter Experts and Knowledge Base Approvers will ask the knowledge proposer for additional information.

Knowledge Base Statistics Report

This report provides the following information:

- The number of knowledge base records at each stage of workflow
- The age of each knowledge base record
- The number of knowledge base solutions rejected at various stages of workflow
- The number of knowledge base records that were proposed, but rejected because of redundancy

Knowledge Base Records by Creator

This report helps you to understand which knowledge creators are creating high value knowledge. This report displays all the status of knowledge records by each user. It also displays the numbers and percents of all the different status of knowledge base records at a given time. The report tracks:

- The number of knowledge base records each user has proposed.
- The number knowledge base records each user has had rejected.
- The number of knowledge base records approved. For knowledge base records approved, the report will display the problem solving score and the user rating.

Help Desk Best Practice: Implement Service Request Automation Processes in your Help Desk Software

There are many good help desk best practices to assist your staff to quickly process and resolve customer issues.

Help Desk Software Accepts Attachments and Screen Shots

Sometimes a picture is worth a thousand words. Files and screen shots can be attached to service requests for further documentation.

Help Desk Software Integration with Remote Control Software

The ability to view the customer's screen shortens diagnostics and improves training.

Quick Customer History

When creating a new ticket, immediate view of customer's current ticket history can give insight into current problem and it may avoid duplicate tickets.

Quick Resolutions

User configured resolution text that, when selected, automatically populates resolution fields.

Automate Email-to-Service request Creation

This provides a function that allows customers to use their existing email program to submit service requests to the support organization and have the help desk software system automatically create a service request.

This can save a significant amount of time and money for the Help Desk. The customer receives an email confirmation just as if they opened a service request by speaking with an Agent on the telephone.

Automatic Reminder of Standard Operating Procedures and Questions to Ask Customers

This allows the help desk software system administrator to configure and attach procedures and questions to the service request categories. Selecting a service request category prompts the agent user with the Standard Operating Procedure and/or questions to ask.

Reminding agents of standard operating procedures to follow and/or questions to ask the customer helps create a very well qualified service request for the 2nd level to begin working on if the help desk agent is not able to solve the problem.

Parent/Child Service requests

This provides for the capability to open up “service requests within service requests”. Cross-functional projects can be managed in this manner. If there are many tasks that have to be tracked in one service request, then the Parent/Child service request is an excellent tool to use. It is an especially useful tool if multiple people have to work on the service request at the same time. For example, when there is a new hire at your company, a “Parent” service request can be opened with multiple “Child” service requests attached to it.

For example, the each Child service request could be as follows: set-up a network connection, set-up a phone extension, set-up an office, set-up a PC, order a cell phone, etc. All Child service requests must be closed before the Parent service request can be closed. A report to track the status of Parent/Child service requests is important. There are many other uses for the Parent/Child Service request. For example, office moves and employee terminations.

Multiple Independent Service Desks within Help Desk Software System

This provides the capability to have multiple independent service desks within the help desk software system. This is important when used within a single company where many different departments or divisions can share a single underlying database of employees. All service desks are independent entities. Each service desk cannot view service requests from any other service desk. The following are examples of departments within a company that may want to have their own service desk: Information Technology, Human Resources, Accounting, Marketing, Facilities, Operation and Manufacturing. All these departments can share the same underlying database of employees, but have their own unique service desk configuration. When many departments use the same help desk software system, this provides great economies of scale and saves the company money.

Parent/Child Quick Service Requests for Major High Volume Incidents

This provides the Help Desk with the capability to create multiple service requests for the same event with the same information. This is for when there is a major outage and the Help Desk is flooded with calls. This is the time when it is critical that the Help Desk be able to record all contacts about this event so that the true impact of major outages are reported. When a service request is closed, it is possible to close all the service requests.

Complete Audit Trail of all Service Requests and Knowledge Base Records

All changes made to a service request are automatically recorded in the service request History field. When the service group, assignee, problem description, or any other field is changed, this change is captured along with the date, time and the person making the changes. This ensures complete accountability.

Quick Service Requests

Quick Service requests are predefined service requests that are set-up in advance. An example of one is “Status Request”. In fact, industry numbers indicate that as much as 30% of Help Desk contacts are for status requests. It is critical that the Help Desk be able to quickly record all such inquiries so that the true workload of the Help Desk can be evaluated and that processes can be put in place to reduce these expensive routine requests.

Service Request On-Hold Clock

A function that allows assignees to track time waiting for customers to get back to them with information. The System automatically calculates how long ticket was "on hold" in case of Service Level Agreement breach.

User can keep track of the amount of time that they are not able to work on a service request because of circumstances beyond their control. A few examples: waiting on a customer for information, waiting for a part from a vendor, etc. Each time the service request is placed "on hold" or "off-of-hold", a message is added to the service request history and the cumulative time is calculated and placed in the service request. Also, to place a service request "on hold", requiring a reason is important

Create Multiple Service requests at Same Time
This provides "hot" keys and mouse "clicks" to make it easy to open multiple service requests at the same time without having to complete an existing service request. This is useful when the Help Desk phones keep ringing and it is important to capture the calls quickly.

Help Desk Best Practice: Use the Help Desk Software System to Increase Communications With Agents and Customers

Marquee Scrolling Emergency Messages
This is a message that is continuously scrolled in the help desk software application. This is so that all logged in users can see this information. For example, a typical Marquee Message might be used to communicate that an important application or a server is down. When you create a Marquee message, there should be an option to also send a page and email to a predefined list of users with the description of the Marquee message. This is a benefit to IT management who are typically not logged into the help desk system.

Email Customers
With the click of a check box, you can designate that a specific service request note should be emailed to a customer. This can be used as a way to notify customers that they need to do something (i.e. reboot) when a service request had been closed.

Data Record Lock Notification
If a service request is already in the process of being edited by an agent or customer and then a second person tries to edit that service request, that second person will receive a warning that the service request is temporarily locked.

Assignee Alert Pop-up
This provides that an assignee of a new service request can be automatically notified by a pop-up message advising them that they have a new service request. This saves time because they do not have to run a report or look at their service request queue. Also, within the pop-up notification is a hyperlink that can take them directly to the service request.

Broadcast Messages
This allows authorized individuals to post a message in the system that can be seen by all selected agents in specific service groups. Broadcast messages are presented to users when they log in. This is a convenient communications tool to keep service groups informed of important information.

Automated Service request Escalation
Based on SLA response time settings, service requests are automatically escalated to designated persons or groups. Email and/or Page notifications are also automatically sent indicating this escalation. This ensures that SLA contracts with your customers are honored.

Chat
Customers have the ability open a chat session with the help desk from the customer self-service web portal.

Hot Keys & Keyboard Shortcuts
Many “hot” keys and other shortcuts are available to help users quickly move from one task to another.

Help Desk Best Practice: Implement a Customer Self-Help Portal accessible 24 hours/day

The cost per help desk contact method varies with the type of submit method.

Method	Cost
Self Service	$5
Web	$8
Email	$16
Phone	$25

Source: HDI and Meta Group

Allowing customers to access a self-help portal to resolve their own issues, when appropriate, or create their own service requests can save your organization a significant amount of money. A web self-service knowledge base and self-service help desk software system may be an alternative for weekends or after business hours when the volume of calls is too low to justify staffing the help desk.

Easy Web Self-Service Access
For ease-of-use and simplicity the web base self-service access should have a very limited number of functions that customers can perform: (1) Create new service request, (2) View current service requests, (3) Knowledge base search, (4) View hot issues, (5) View an FAQ, and (6) Change Password.

Help Desk Best Practice: Use Real-Time Help Desk Reports, Dashboards, Metrics and Analytics

That which is not measured, cannot be managed.

The concept of improvement has, at its heart, the act of measurement.

All business improvement programs, from Six Sigma to Balanced Scorecard to kaizen, rely on metrics definition and monitoring not only to quantify success, but also to drive improvement. Companies have found that the implementation of a metrics program leads to improvement in and of itself, even without being accompanied by any activities specifically designed to produce improvement. The reasons for this are still being debated, but studies have shown that people will change their behaviors in order to improve measurements, regardless of whether there is any incentive for doing so.

Char LaBounty, The Art of Performance Management, Senior Fellow, Help Desk Institute

Help Desk Best Practice: Perform Root Cause Analysis everyday and determine why problems occur.

IMPORTANT QUESTIONS

- In one second and with one click, can every IT employee select a mandatory Root Cause field from a list of highly relevant Root Cause categories before a Service request is closed?
- In ten seconds or less, can every IT employee enter a required problem resolution before a service request is closed?
- In ten seconds or less, can you determine which IT employees are not consistently documenting service requests with meaningful problem resolutions?
- In ten seconds or less, can you perform Root Cause Analysis at the end of each day before going home? In ten seconds or less, can you send this Root Cause Analysis to three other people?
- Can you identify at least three actions that you can take the next day to help reduce call volume? Bonus points if you can find nine actions to help reduce call volume the next day and delegate three actions to two other people who will take ownership.
- In thirty seconds or less, can every IT employee tell you the difference between a Root Cause and the associated problem description, problem category and problem resolution?

Help Desk Best Practice: Implement Service Level Agreements Linked to Impact on Firm Revenue

IMPORTANT QUESTIONS

- In three seconds or less, can each of your service desk analysts categorize a service request by severity level based upon the impact to firm revenue?

- In ten seconds or less, can you measure Service Level Agreement compliance (Respond and Resolve) as follows?

  This morning
  Yesterday
  Last Week
  Last month

  Further by:

  Region
  Country
  Office
  Department
  Customer

  Further by:

  Severity Level
  Creator
  Last Assignee

- In ten seconds or less, can you analyze Service Level Agreement compliance over a trend line?

- In ten seconds or less, can you perform Root Cause Analysis on service requests out of SLA compliance at the end of each day before going home? In ten seconds or less, can you send this SLA Root Cause Analysis to three other people?

- Can you identify at least three actions that you can take the next day to help increase SLA compliance? Bonus points if you can find nine actions to help increase SLA compliance the next day and delegate three actions to two other people who will take ownership.

Predefined & Customizable Help Desk Reports
Predefined and customizable help desk reports provide metrics, trends and graphical representations of your help desk organization's performance.

First Call Resolution Help Desk Report
This help desk report tracks how long it takes to close first call and non-first call service requests. This time duration is measured from the time the customer profile is retrieved until the time that "Finished" is clicked. The help desk report not only assists in measuring help desk analyst efficiency, but also helps to measure the organizations cost efficiency. Industry sources report that cases closed at first level cost between $15 and $30 each while second level cost between $75 and $250 each (Meta Group and Help Desk Institute). You should calculate your own cost/case for your Help Desk and determine your financial goals.

First Call Trend Help Desk Report
This is a trend help desk report showing the percentage of total service requests resolved by the Help Desk over time. With this trend report, you are able to see your progress toward your goals.

SLA Compliance Help Desk Report
This help desk report provides the ability to see SLA compliance from the perspective of Service Groups, Agents or Customers. For example, a particularly challenging customer may complain that the Help Desk is not providing an adequate level of service. This report will show you exactly how the Help Desk performed over time with this specific customer.

SLA Compliance Trends Help Desk Report
This help desk report shows SLA compliance over a period of time. Managing trends toward a higher goal can dramatically increase customer satisfaction.

Root Cause Summary Help Desk Report
When you have defined Root Cause codes and applied these to each closed service request, then the Root Cause help desk report can show you what is causing your customers to contact the Help Desk. When used as part of a cost containment/case reduction strategy, this help desk report will show you what problem to address first. After the systemic process or

infrastructure corrections have been made, this help desk report will show how effective your corrective actions have been.

Customer Satisfaction Survey Help Desk Report
This report shows the results of customer satisfaction surveys.

Customer Satisfaction Trends Help Desk Report
This help desk report shows the results of the customer satisfaction surveys in the form of a trend report. This is very useful when used in conjunction with the SLA Compliance help desk report to demonstrate the level of service provided and the level of customer satisfaction your team is delivering to your organization.

Service Request Category Bar Chart Help Desk Report
It is inefficient to have service request categories that are not used. First, it slows down the processing of new service requests. Second, it leads to improper categorization. This help desk report displays a list of all categories with the frequency of use. At least once a quarter this help desk report should be run to view the category use distribution. You can then disable categories used infrequently. Frequently used categories can be used in conjunction with a Root Cause help desk report for performance improvement initiatives.

Service Request Category Trends Help Desk Report
This report along with the Category Bar Chart help desk report provides a more detailed picture of category usage. For optimal use, you can select a single category for detailed analysis and run the report for a year. It will show you usage by month for your date range. The trend line may give you insight into problems that need further investigation.

Open & Closed Service Requests Help Desk Report
This is a powerful help desk report that can be used to identify and plan workload. This help desk report will help you determine if your scheduling throughout the day is appropriate for the call volume and if your total staffing is adequate for any given call load.

Processing Work Load Help Desk Report
In this report, you can see how many different kinds of submit methods (Phone, Email, Web, Walk-in, etc.) are used for any date range and the time of day selected. You can also see the length of time it takes to process and resolve calls. This is a valuable help desk report because the workload of the help desk organization is not adequately represented via your ACD reports since the time to process and resolve calls is not captured.

Processing Work Load-Off Hours Help Desk Report

In reality, the help desk and your other support groups do not work an eight, ten or twelve hour shift. Their expertise may be needed at any time. With an Off Hours help desk report so that you can track how many cases are being resolved after normal hours, what hour it was resolved and by the submit method. This report can assist you in your staffing analysis.

Re-Opened Service Requests Help Desk Report

Help Desk Best Practices dictate that a service request should not be closed unless the customer is satisfied with the service. Also, if a customer calls the Help Desk organization to say that the work done did not fix their problem, then the service request should be re-opened. The Re-Opened Service Requests help desk report gives you a listing by severity level of the number of service requests re-opened for the date range selected.

Submit Method Trends Help Desk Report

This report help desk report displays metrics for the total for each type of submit methods (Phone, Email, Web, Walk-in, etc.) with the percentage of the total and a bar chart of the volumes by day.

Service Request Count Help Desk Report

This help desk report provides multiple methods to view how service requests are created and resolved: service request Count by Assignee, by Creator, by Location and by Service Group.

Service Request Frequency Help Desk Report

This help desk report helps you pinpoint potential problems. For example, you might want to select a location and want to see the service request volume from the top twenty-five customers. This would allow your service department at that location to review all the cases from the most frequently calling customers and create a strategy for reducing the number of contacts. For example, this might mean rebuilding their computer, replacing their computer or provide specialized training. By running this report on a regular basis, you can obtain the information and apply it to an on-going improvement program.

Closed Service Requests Report Help Desk Report

This help desk report allows you to pick a date range, service group(s), region(s) and time of day and whether you want to see the chart hourly, daily, monthly or yearly. The chart will give you a great visual trend of the number of service requests closed for the parameters you selected.

Closed Quick Service Requests-Major High Volume Incidents
This function provides the help desk with the capability to create multiple service requests for the same event with the same information. This help desk report allows you to enter a date range, service group(s), location(s) and report on the impact of these major outages. Over time, this help desk report will give you some insight into the stability of your infrastructure.

Escalation Statistics Help Desk Report
Escalations occur when a case is not handled within the times you set for response or resolution according to your Service Level Agreements. The goal is to minimize escalations. This is particularly important for high severity level service requests. This help desk report allows you to monitor individuals, service groups, or customer locations for escalation performance. This report can also help you to monitor all situations and intervene proactively to minimize escalations.

Escalation Trends Help Desk Report
Escalations do occur for various reasons, but it is the trend over time that is more important to measure because it reflects underlying problems.

Current Escalations Help Desk Report
This report allows you to see service requests that are currently in escalation by service group, assignee and severity level. The report also helps you plan and balance your workload.

Customer History Help Desk Report
When a support person is creating a service request or is in the process of working on a service request, it is helpful to know if this problem has occurred before or if there has been any other circumstance that may have lead to the current situation.

Help Desk Best Practices: Use Real-time Reporting Features that Decrease Time Required to Prepare Reports

Customized to User
Provides for all help desk reports with date ranges that take into account the logged-in Agent's date and time zone.

Real-time Reports Automatically Emailed
All Agents can set up automated email report delivery without having to log in and run the reports.

My Help Desk Reports Section
This provides a Reports section that allows you to place the reports you most frequently use at the top of this page under, “My Reports”.

Report Data Downloads in Excel and PDF Formats
Provides added functionality to download the help desk report data into Microsoft Excel format. The data can be further analyzed in your own format. Help desk reports can be converted into a PDF format and instantly be emailed to one or more people.

Help Desk Reporting by Regions and Locations
Provides for the running of reports for specific region(s) and all locations linked to that region. This makes it easy for companies with worldwide locations to run reports for any specific location or region.

Saved Help Desk Report Settings
Provides that all Report settings can be saved and used as defaults for the next time the Report is run. This saves time and helps in replicating help desk reports with common selection criteria.

Help Desk Dashboard on Management Home Page
Provides a special Home page for IT help desk supervisors and IT managers. This contains summary reports on the health of the help desk support organization.

Help Desk Industry Best Practices: Implement an Asset Management System that is integrated with the Help Desk Software system

A good help desk best practice is to import all assets into the help desk software system so that asset can be attached to service requests and tracked. Each asset profile should be a “medical chart” that tracks any changes to the asset configuration. This is a Configuration Management Data Base (CMDB). The help desk software should place a copy of the help desk service request history into the asset profile/CMDB so that all the relevant asset information is maintained in one place for easy reference.

Part of the Information Technology Infrastructure Library (ITIL) foundation requirements is configuration management. The purpose of this is to capture changes to an asset configuration so that when a customer contacts the Help Desk and reports hardware or software problems, the Help Desk agent can quickly determine if there have been any recent changes to the asset in question. The asset profile shows warrantee information so that incidents for assets still under warrantee can be referred back to the vendor. This saves diagnostics time.

Purchased-Software License Library
Keep track of all licenses purchased by your organization. This library is used to compare with the number of actual used licenses for software audit compliance.

Detailed software license type categories
Keep track of all the various software license types (e.g. Enterprise, OEM, Network, etc.)

Link asset owner and assignee to customer database
Linking to customer database ensures consistency

Configure asset acquisition information
Vendor, acquisition method (lease, rent, purchase), date, warranty terms, lease terms.

Software type categorization
Create your own software categories and then assign them to the licenses. Reports clearly show where resources are spent supporting multiple applications for the same purpose (e.g. Desktop Publishing)

Used- Software License Detail
Link software license library to hardware assets. This provides automatic registration with software library and verification with total number of available licenses.

Customizable software library and detail records
Capability to add your own fields to either the Purchased-Software License Library or Used-Software License Detail tables to fit your own business requirements.

Configure asset detail to your environment
Configure your own lists of to any detail that makes business sense (e.g. O/S, Bios, Hard drives, memory, add-on cards, software and peripherals)

Easy link to incidents
Link a help desk service request to an asset to detail problems and service performed

Real time software license compliance
When creating and linking software to an asset, automatically verify that you have a license available for use. A total available and total used license count is kept current by transaction verification.

Asset Auto-discovery integration with Help Desk Software System
Integration with existing or purchased infrastructure discovery tools

Help Desk Best Practice: For Asset Management Use Real-Time Reports, Dashboards, Metrics and Analytics

Leased Assets Aging Report
Today, it is common for many IT organizations to lease more and more of their assets. This asset management report allows you to evaluate the timing of leases ending and to plan for the return of termed assets. You can also plan for training on new assets so that your employees remain productive while learning new technology

Assets by Customer
This is a particularly important asset management report if your company has a lot of employee turnover. When the help desk gets a termination notice, they can quickly run this report to identify what assets are assigned to this customer.

Asset Repair Frequency Report
This asset management report can help you compare different manufactures or models for reliability. When you attach an asset to a ticket, it will appear in this report. When it comes time to make purchasing decisions you can use the Asset Repair Frequency Report to determine which manufacturers, or models needed the most repair.

Asset Inventory Count Report
This asset management report allows you to get accurate counts of asset items by assignee departments, asset types, locations and/or manufactures.

Software License Documentation Summary
This asset management report shows by Software Title and version, how many licenses the company has.

Software Inventory Summary
This asset management reports a simple total of installations by software title and version number.

Software License Change Report
This asset management report displays for a period of time the number of licenses used compared to the total licenses purchased on a daily basis.

Software License and Summary
This asset management report compares deployed software licenses to purchased licenses and can be used to prove software compliance.

Assets by Acquisition Method
This asset management report allows you to select the method, the department or the manufacturer and obtain a report of all the assets fitting specific criteria. Querying for only leased assets helps to identify assets for return at the end of the lease period without penalty.

PC Software Inventory Report
This asset management report is used to determine software installed on a single PC.

Assets by Profile Fields
This asset management report allows you to design your own report based on any asset field.

Asset Loaner List
This asset management report allows you to track assets loaned to employees.

Software and Hardware Inventory Report
This asset management report displays hardware configuration and the software installed on selected asset(s). Used by support personnel for diagnosis and for Adds/Moves/Changes.

Help Desk Best Practice: Implement an ITIL Change Management Software System and ITIL processes. Integrate the Change Management System with the Help Desk Software System. Reduce Problems Due to Change Related Failure.

IMPORTANT QUESTIONS

- In ten seconds or less, can every IT employee obtain visibility to the forward schedule of IT changes for the next day(s), week(s), month(s), etc?

- Can the Change Advisory Board have brief impromptu meetings and in less than ten seconds access the proposed IT changes that need to be approved?

- In five seconds or less, can a service desk analyst link a service request to a Change Request?

- Does the Change Advisory Board perform weekly and monthly Root Cause Analysis and in ten seconds or less can they access all Induced Problems which documents unsuccessful changes and the reasons?

- In ten seconds or less, on a weekly and monthly basis, can the Change Advisory Board determine the Resolution Cost in hours to determine the impact of induced problems?

- Does the Change Advisory Board perform a weekly and monthly review of Backed Out Changes and in ten seconds or less can they access all Backed Out Changes by change category?

- Can the Change Advisory Board identify at least three actions that they can take each week help reduce change related failures? Bonus points if they can find nine actions to help reduce change related failure and delegate three actions to two other people who will take ownership.

Integrate Help Desk Software with ITIL Change Management Software System to Link Induced Problems to Changes

With integration, the help desk software system has the ability to link ITIL change management incidents to specific changes. This saves the Change Manager time and improves accuracy.

Change History Diary

The ITIL change management software application automatically captures and records all changes to the Request for Change in a history field.

Pending Actions Automate Notifications

Various pending actions (e.g. approval, more information, back-out plans) trigger email notifications to people identified in the Request for Change.

Required Close Codes

After implementing a change, the Change Manager enters codes such as Successful, Unsuccessful, Backed out, etc. This allows for review and improvement.

New Request for Change Notification
When a new Request For Change is submitted, the Change Manager is automatically notified via email. This has an embedded hyperlink to the change record and helps get the Request for Change into the approval process quickly.

Simple Request For Change
The Request for Change is easy to complete with a minimal number of required fields. This enables customers to request changes with few errors.

Attach Documents
The ITIL change management software application must make it easy to attach documents such as project, test and back out plans. This saves time and allows you to use existing forms.

Required Impact Codes
Impact codes help to classify the request for change. Impact is the result of business urgency.

Minor Changes Receive Streamlined Approval
Since you do not want the ITIL Change Management process to be a bottleneck, minor changes (e.g., upgrade operating system to XP) get immediate approval without going through the Change Advisory Board.

Simple Change Management Roles
Roles are in accordance with ITIL best practices (Users, Change Manager, Change Management Board and Emergency Committee).

Induced Problems Associated with Changes
The Change Manager can enter associated induced problems making process improvement easier.

Configurable Priority Codes
ITIL suggests that priority codes be Minor, Significant, Major and Urgent. A good ITIL change management software application should allow you to use your own designation and link it to ITIL standards facilitating workflow.

Help Desk Best Practice: For ITIL Change Management Processes to be Successful Use Real-Time Help Desk Reports, Dashboards, Metrics and

Analytics

That which cannot be measured, cannot be managed.

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All business improvement programs, from Six Sigma to Balanced Scorecard to kaizen, rely on metrics definition and monitoring not only to quantify success, but also to drive improvement. Companies have found that the implementation of a metrics program leads to improvement in and of itself, even without being accompanied by any activities specifically designed to produce improvement. The reasons for this are still being debated, but studies have shown that people will change their behaviors in order to improve measurements, regardless of whether there is any incentive for doing so.

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Change Management Reports

Request For Changes Close Code Report
Change management report used for process improvement with the goal to have all requests for change successfully implemented.

Request For Change Status Report
Change management report displays all currently open request for changes by volume and status category. You would use this information to apply workload balancing where needed.

Forward Schedule of Request For Changes
This is the most critical change management report. All scheduled changes appear in this report. The help desk uses this report to inform customers of planned outages and for linking incidents to changes.

Back Out Request For Change Report
Change management report lists all backed out changes by service groups, categories, scope and priority. This report makes it easier for implementing process improvement.

Request For Change Rejection Reason Report
Change management report used for process improvement with the goal to have as few changes rejected as possible.

Induced Problems Report
Change management report shows all the problems that occurred because of changes. If integrated into a help desk software solution, it also shows the cost in hours of induced problems.

Successful Request For Changes Report
Process improvements come from reviewing what went right. This change management report allows you to view successes.

Request For Change Volume Report
Change management report shows trends of request for change volume over a date range. A great report for planning future change needs.

Request For Change Category Report
Change management report used to identify where all the request for changes are occurring. Problem Management uses this information to design a way to permanently remove the root cause from the infrastructure.

Scheduled Request For Changes by Scope

Scope is configurable. Examples are Local, Single User, Global, etc. This change management report allows you to view by 24 hours, for the week and month. This is a great tool for resource planning.

Request For Change Source Report

Change management report allows you to view request for changes by customer departments so that you can implement preventative steps for high demand departments.

My Requested Changes Report

Change management report quickly lists all request for changes by the logged in user including the status and the service group working on the change.

Scheduled Requests for Change by Service Group

Change management report provides a graphical presentation of the number of request for changes scheduled in the next 24 hours, the next week and the next month. A good tool for resource planning.

ABOUT GIVA

Founded in 1999, Giva was among the first to provide a suite of help desk and customer service/call center applications architected for the cloud.

Now, with hundreds of customer driven releases, the Giva Service Management™ Suite delivers an intuitive, easy-to-use design that can be deployed in just days and requires only one hour of training. Giva's robust, fast and painless reporting/analytics/KPIs quickly measure team productivity, responsiveness and customer satisfaction resulting in faster and higher quality decision-making. Customization and configuration are all point and click with no programming or consultants required to deliver a substantially lower total cost of ownership.

Giva is a private company headquartered in Santa Clara, California serving delighted customers worldwide.

robust, fast & painless reporting for higher quality decision-making
deploy in days, train in 1 hour
highly customizable without programming or consultants
the Givadifference