



Leading IT Service & Support

Aetna Measures Up to Excellence: Secures HDI Support Center Certification

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The support center industry has matured significantly over the past two decades, yet the adoption of best practices has been uneven. To provide an objective measurement of support center performance, the HDI International Certification Standards Committee (ICSC) developed the HDI Support Center Standard, an aggregate of best practices focused specifically on the support center. The overall purpose is to provide an objective, unbiased mechanism for organizations to compare the maturity of their support center operation to current best practices.

First defined in 2000, the HDI Support Center Standard was designed to conform to international quality standards. The model for the Standard is based on the European Foundation for Quality Management framework with modifications to meet the quality requirements of support centers. The Standard is analogous to ISO9000 in that it requires quality processes and procedures that are documented, followed, and consistently produce expected results. The certification program recognizes support organizations for performance excellence based on the Standard like the Malcolm Baldrige National Quality Award.

The HDI Support Center Standard is updated periodically to incorporate developments in industry best practices.

Achieving the certification requires a thorough audit of the support center and its processes and procedures by an HDI-Certified Auditor who will objectively rate the center's maturity based on the HDI Support Center Standard.

The HDI Support Center Standard

Recognizing there are differences between organizations, the HDI Support Center Standard does not specify particular systems, but rather it requires quality processes and procedures that are documented, followed, and produce expected results. Differences in adoption of the HDI Support Center Standard are acceptable, as long as the required activities are addressed.

The HDI Support Center Standard is organized into eight elements. Five of these represent Enablers of quality, or actionable items. The remaining three represent Results, or actual performance against defined targets. In each of the two main areas, a support center's maturity is measured using a four-level maturity scale.

HDI Support Center Standard	
Enablers:	Maturity Levels
■ Leadership	1. Just Started 2. Some Progress 3. Considerable Progress 4. Fully Achieved/Optimized
■ Strategy and Policy	
■ People Management	
■ Resources	
■ Process and Procedures	
Results:	1. Measured
■ People Satisfaction	2. Comparisons to Goals
■ Customer Satisfaction	3. Trending to Goals
■ Performance Results	4. Consistently Meeting Goals

The Certification Process

On average, preparing for the certification audit takes approximately six months and requires a significant time investment on the part of the support center management. Achieving certification requires that the organization receive a minimum rating score. The certification audit is conducted by an HDI-Certified Auditor who visits the support center to interview key personnel, review documentation, and observe the support center activities and environment. The auditor then assigns an objective rating of maturity for each activity defined in the HDI Support Center Standard. A weighted scoring system determines the overall maturity level. If the minimum or higher rating scores are achieved and confirmed by HDI, the certification is granted and is effective for a period of two years.

While a rigorous and challenging process, the HDI Support Center Certification is the most meaningful verification of excellence in the support industry. For outsourcers, it provides a competitive differentiator, and, for in-house organizations it is a testimonial to excellence that is critical to an ongoing “journey of improvement.”

Aetna Achieves Support Center Certification

One organization that has embraced support center certification is Aetna Insurance. Dave Snow, Help Desk Support Manager, has seen it all when it comes to the Aetna support center. Starting as an agent in 1995, Dave worked his way to supervisor and now as support manager, overseeing a group of 45 agents fielding calls from Aetna’s 40,000 users. In 2007, Aetna first sought to have their operation certified for the HDI Support Center Standard. While a significant commitment, Aetna has used the certification process not only to measure themselves relative to support center best practices, but to better tune their management processes toward continuous improvement.

Snow does not look back fondly on his early experiences on the help desk. When he started, the help desk was primarily a “dispatch center” that received an incident report, called somebody to fix it, and followed up if they didn’t. Rather than “resolving” problems they were serving primarily as a middleman between the user and the fixer.

As time went on, they did begin to move towards professional support center management. Drawing on resources like HDI, they began to focus on data gathering, analysis of key performance metrics, and developing the support center into a real career path within IT. With that turnabout

came a transition from dispatcher to problem resolver and the agent satisfaction and customer satisfaction grew as a result. Today their first call resolution objective is 83%.

The idea to seek the HDI Support Center Certification came when Jim Cavallo, Network Distributed Support Head, attended an HDI meeting where they described the certification process. Jim immediately recognized a benefit not only in terms of the support center itself, but in how Aetna marketed its capabilities to prospective customers. Soon Dave started what would prove to be an intensive six month learning and growing experience.

Aetna started the process with a self-evaluation and based on their existing systems and practices, felt that they would have a pretty good shot at earning the certification. They then moved on to HDI's pre-evaluation, where they formed a clearer idea of where they stood, and the steps they would have to accomplish to gain certification. According to Snow, Aetna already had many of the basic processes in place and was already managing the key performance metrics, but the certification process helped them "pull it all together."

While fairly rigorous, Dave says the process "shows you your shortcomings, but also helps you to put the corrective actions into place." So if you go about it in the right fashion, the exercise can help you to wind up with a better managed operation in the end. For example he notes that prior to the certification, new applications were brought on line but didn't have performance goals. Now they not only have goals but defined plans for how to achieve them.

Aetna found that the certification had benefits beyond a better managed support center. In bidding for large contracts, Aetna must demonstrate to prospects how they ensure best practices in their entire IT operations. Those presentations touch on overall performance, security, disaster recovery, and CMMI (Capability Model Maturity Integration) maturity level. HDI Support Center Certification is now part of that presentation and is used to demonstrate the company's overall dedication to top-level IT support.

As the HDI Support Center Certification is granted for a two-year period, Snow and his group are gearing up right now for their renewal. Having been through it once, he says it's a major advantage. "The first time through we underestimated the time commitment required and didn't ask for enough guidance upfront." Having already refocused their management processes based on their last certification, he's not worried about the outcome. All in all they are looking forward to the process, because you don't get better without working at it.

About HDI

HDI is the world's largest IT service and technical support membership association and the industry's premier certification and training body. Guided by an international panel of industry experts and practitioners, HDI is the leading resource for help desk/support center emerging trends and best practices. HDI provides members with a vast repository of resources, networking opportunities, and the largest industry event, the HDI Annual Conference & Expo. Headquartered in Colorado Springs, CO, HDI offers training in multiple languages and countries. For more information, call +1 719.268.0174 or visit www.ThinkHDI.com.