NOVEMBER / DECEMBER 2013

HDI SupportWorld™

A PROFESSIONAL JOURNAL FOR THE TECHNICAL SERVICE AND SUPPORT COMMUNITY

# Five Issues You Can't Afford to Ignore in 2014

Moments of Truth: The Future of the Customer Experience

Health Check: The Challenge of Mobility

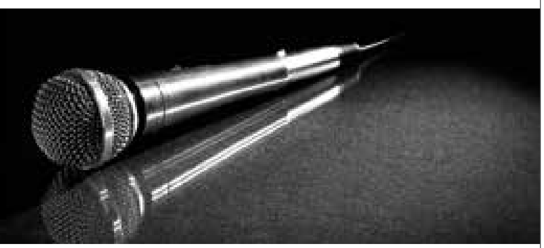
Help Centers: The Future of Enterprise IT Support

A Match Made in Heaven: Application Virtualization and the Service Desk

It's Not About the Channels in Your Support, It's About the Support in Those Channels

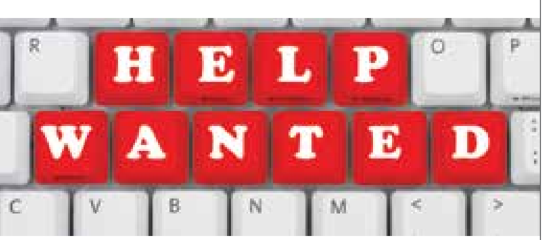
UBM Tech











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UBM Tech

HDI SupportWorld™
A PROFESSIONAL JOURNAL FOR THE TECHNICAL SERVICE AND SUPPORT COMMUNITY

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# HOT LINKS

## New Research: 2013 HDI Support Center Practices & Salary Report

Every year, the HDI Practices & Salary Reports improve our understanding of the technical service and support industry by capturing crucial data from support centers just like yours. This year's report features data and trends relating to technology, processes and practices, salaries, ticket management, and more!

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*By Kelly McLaughlin*

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## Dear *SupportWorld* Readers,

Another year is almost gone, but what a great year it was! It's amazing to think that the things we were discussing five years ago, the things we thought would be our future, are the here and now: the customer experience, mobility, anytime, anywhere support, BYOD, the cloud, etc. All of these solutions have gone mainstream, and the technical service and support industry has stepped up to support them.

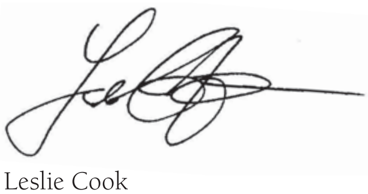
Those people, process, and technology trends that were our future are now our present. Take, for example, the customer experience. The customer experience is the sum of all of a customer's interactions with a company, at every stage of the customer journey: discovery, evaluation, purchase, access, use, support, etc. Focusing on the customer experience leads to customer-centric support, or a more proactive means of satisfying customers. How can we manage the customer experience? By measuring it and providing a framework for identifying, organizing, presenting, and taking action across the enterprise.

But customer experience is just the tip of the iceberg. In this issue of *SupportWorld*, we're focusing on the trends you can't afford to ignore in 2014 and beyond. Charles Araujo explains how we can renew our focus on the customer. Heidi Cook considers the challenge of mobility from the perspective of a healthcare system. Brian Madocks argues that help *centers* are the future of enterprise IT support. Eveline Oehrlich and David K. Johnson tell us why the service desk and virtualized applications are a match made in heaven. Finally, Alan Berkson argues that it's not about the channels your support center provides, it's about the quality of the service provided *in* those channels. In addition, Cindy Smith explains how processes can be optimized for knowledge, the HDI Desktop Support Forum identifies good practices for hiring contractors, TJ Martinez and Andrea Rodgers shares the story of the University of New Mexico's Office 365 implementation, and Gina Montague delivers quick tips for support leaders.

The industry will continue to evolve, and while we will continue to focus on these trends, we must prepare for the future.

As always, we welcome your feedback. Please send your comments and suggestions to **Editor@ThinkHDI.com**.

Kind regards,



Leslie Cook
Director of Membership

# You Are Not Alone: Highlights from HDI's Annual Report on Support Center Practices

By Jenny Rains

Each year, HDI releases an annual report on practices and salaries in the technical support industry. The goal of the HDI Practices & Salary Reports is to help support center leaders better understand the workings of the industry as a whole, and to provide them with the knowledge they need to make research-based decisions and ultimately improve the support provided by their organizations. The full *2013 HDI Support Center Practices & Salary Report* illustrates current practices and trends in a variety of areas, such as performance metrics, ticket management, technologies, framework adoption, outsourcing, training, and compensation. This article highlights some of the most interesting findings.[1]

Based on this report and other recent HDI research and networking, we know that, this year, support organizations have been focusing on supporting business growth. This often translates into more customers, more equipment, and more applications; infrastructure changes; and/or a wider scope of services offered. Each of these factors has contributed to an increase in support center ticket volumes. Sixty-six percent of support centers reported an increase in ticket volumes over the previous year; this is on top of the 66 percent that reported an increase in 2012.

[1] The *2013 HDI Support Center Practices & Salary Report* comprises survey responses from 754 technical support professionals in more than thirty vertical industries. These responses were collected via web-based survey from April to July 2013, and they were submitted by support center managers and professionals in similar positions.

66% of support centers reported an increase in ticket volumes.

With regard to ticket volume, it's interesting to note that while supporting a more mobile workforce and BYOD are still in the top-ten list of factors contributing to ticket volume increases, their impact has decreased significantly. While recent HDI research revealed that workforce mobility and consumerization remain at the center of technical support managers' focus, consumers and the industry as a whole seem to be more comfortable or knowledgeable about mobility and its associated technologies.

To help manage increasing ticket volumes, many support centers offer multiple channels of support, with new options being added to meet customers' expectations and demands (i.e., some customers want to talk to a live person and work through their issues, while others avoid the phone at all costs and expect to have other options for contacting the support center). For these reasons, the phone channel continues to be available in 97 percent of support centers, and, while it's the most expensive channel at $18 a ticket, the majority of support centers (56%) continue to provide walk-up support. Chat (24%) and web requests (63%) are also continuing to grow in popularity.

Social media has not gained the widespread industry popularity many anticipated, although some vertical industries have embraced it more than others (e.g., higher education). The most common use of social media is for sharing knowledge. Fifty-six percent of support centers are using SharePoint to share knowledge, while applications like Facebook and Twitter are used primarily to push support information out to the appropriate audience.

As the industry matures and becomes more proficient at providing multichannel support, its metrics tracking and reporting practices will need to mature as well. Eighty-eight percent of support organizations are tracking their performance using metrics. Many of the metrics reported in the chart below are reported by type of ticket (i.e., incidents and service requests). Thirty-nine percent of the industry measures incidents and service requests separately, and for good reason: incidents (i.e., unplanned work required to fix something) tend to elicit more of an urgent response; service requests (i.e., nothing is broken but a service is needed), while still important, have different goals and therefore tend to have different response and resolution times. For example, the average time to resolve an incident is 4–8 hours (median), but that increases to 1–2 days (median) for service requests. However, the majority of the industry does not measure incidents and service requests independently, even if they distinguish between them in their ticket tracking systems.

For the 13 percent of organizations that reported a decrease in ticket volumes over the last year, there seems to be several common causes. Outside of changes in infrastructure, the next three most reported factors are knowledge management (35%), customer competency (32%), and self-service (32%). These organizations are empowering, educating, and enabling their customers, and it shows in lower ticket volumes.

**QUICK REFERENCE FOR INDUSTRY METRICS**

| | | |
|---|---|---|
| **PHONE:** Average speed to answer (median) | 21–30 secs | |
| **PHONE:** Abandonment rate (median) | 4% | |
| **EMAIL:** Time to respond (median) | 1–4 hrs | |
| **EMAIL:** Tickets transferred to another channel (median) | 10–20% | |
| **CHAT:** Time to respond (median) | < 60 secs | |
| **CHAT:** Tickets transferred to another channel (median) | < 10% | |
| **CHAT:** Average handle time (median) | 8–10 mins | |
| | **INCIDENTS*** | **SERVICE REQUESTS**** |
| Average time to resolve (median) | 4–8 hrs | 1–2 days |
| First level resolution rate (average) | 65.6% | 68.6% |
| First contact resolution rate (average) | 65.5% | 65.8% |
| **PHONE:** Average talk time (median) | 5–8 mins | 5–8 mins |
| **PHONE:** First call resolution rate (average) | 68.8% | 68.0% |
| **EMAIL:** Average handle time (median) | 8–10 mins | 8–10 mins |
| **WEB REQUEST:** Average handle time (median) | 8–10 mins | 8–10 mins |

* Results for tickets that require unplanned work to fix something.

** Results for tickets where nothing is broken but a service is needed.

As the industry continues to realize the benefits of knowledge management, its popularity continues to grow. Industries such as software, banking, and healthcare report that knowledge management systems as the most important technology for their support centers to have in order to provide successful end-user support. While incident management systems continue to be the most commonly selected must-have technology in the industry as a whole (68%), knowledge management, in second place for the last two years, continues to creep up on incident management, with 57 percent identifying it as a requirement for providing successful support in 2013, up from 50 percent in 2012. Seventy-four percent of organizations currently use knowledge management systems, with an additional 17 percent planning to add it in the next year.

In addition to shopping for knowledge management systems, organizations are shopping for self-service technologies: 47 percent of organizations are looking to add new self-service technologies or update/replace the ones they already have. The most common self-service tools in 2013 are password reset (47%), FAQs (46%), incident history (42%), and knowledge bases (41%).

While the variety and popularity of self-service tools continue to grow, level 1 staff still spend more than three-quarters of the day on customer tickets. Level 2 and desktop support technicians spend just over half of their time working on tickets. When the support staff is not available to respond to tickets (i.e., in centers that are not staffed 24×7), the most common practices are for customers to leave a voicemail (52%) or an email (48%); just under half have staff on call during off-hours (46%).

As the eyes, ears, voice, and face of IT, the people who provide support are the support center's most valuable resource. Up until 2007, training support staff on technology was the most common use of professional development resources. After 2007, there was a shift toward using professional development resources to provide customer service training. Since then, these "soft skills" have been the most common area of focus for the front line (i.e., level 1 support), and customer service skills are the most sought-after skills when hiring for and promoting staff into both frontline and desktop support positions. For desktop support, troubleshooting/problem-solving skills come in second, owing to the unique nature of this position.

73% of support centers are hiring.

But who is filling positions this year? Most support centers are hiring in 2013: 44 percent are filling current positions as they become available, and an additional 29 percent are expanding to create and fill new positions. Once frontline positions have been filled, it's not uncommon for new hires to require more than two months of training before they can work proficiently on their own, which is the case in 26% of organizations.

Based on the time and resources (and not to mention cost) associated with finding skilled professionals and then training and coaching new hires, the data suggest that support organizations would benefit greatly from retaining their current staff. Frontline support professionals typically spend about two years in those positions, and attrition for level 1 support is about twice as high as level 2 support, both for those staying in the company and those leaving the company. Management-level support professionals have typically held those positions for more than ten years. Because employee satisfaction factors in to retention, it's still surprising that many organizations are not assessing their employees' satisfaction levels. This year, 31 percent of organizations report that they are not formally measuring support staff satisfaction; those that do typically measure satisfaction annually.

31% of organizations are not formally measuring support staff satisfaction.

Whether staff move on or move up, filling positions with skilled professionals is an ongoing battle in the war for talent in technical support, and compensation is one of the issues organizations must address when seeking new talent. In 2011, 34 percent of support centers anticipated increasing salaries within the year. After a slight dip in 2012 (32%), the numbers were up four percent in 2013, rising to 36 percent. Less than one percent of organizations expect to see salary decreases in the next twelve months, and 50 percent plan to stay about the same.

Average salaries for each position, along with details about each of the topics addressed in this article, can be found in the *2013 HDI Support Center Practices & Salary Report*. The full annual report provides managers and directors with information they need to validate existing practices, discover new ideas for improving methods and procedures in their support centers, and trigger discussions within their organizations, within their businesses, and with their peers. Remember: you are not alone.

*To review the 2013 report and* The War for Talent*, visit* ***www.ThinkHDI.com/Research****.*

## ABOUT THE AUTHOR

Jenny Rains is HDI's senior research analyst. She has worked with HDI in a research/analysis capacity since 2003. Before coming to HDI, Jenny was the research/data analyst for one of the largest school districts in Colorado. Her areas of expertise include survey development, research design, data analysis, program evaluation, and project management. Jenny received her BS in psychology from Sam Houston State University and an MA in experimental psychology, with a focus on research and statistics, from the University of Colorado in Colorado Springs.

# The Daly Interview: Leadership Perspectives

By Cinda Daly

## Disruption: The New Normal and the Leaders Who Take It On

*With Karen Lim, VP, Global Customer Advocacy, and Greg Johnson, Worldwide Software Support, Pitney Bowes Software*

"When companies adopt technology, they do old things in new ways. When companies internalize technology, they find disruptive things to do….The only way to compete is to evolve."

—James L. McQuivey, VP and principal analyst at Forrester and author of *Digital Disruption* (2013)

As Shane O'Neill, managing editor at InformationWeek points out, "With the rise of social media, cloud computing and mobile apps, phones and tablets, the business models and operations of all companies in all industries are at risk of being disrupted."[1] However, disruption is no mere risk; it's a reality. Consider, for example, how Orbitz, Expedia, and other web-based travel companies have made travel agents obsolete; how iTunes and Netflix have permanently changed the way we consume entertainment; and how Amazon has reshaped the retail and IT infrastructure space.

Companies that learn to embrace the technology, channel the disruptive forces, and exploit the spoils will prevail. Accomplishing those tasks requires a completely new type of leader. At Pitney Bowes, Karen Lim and her team are managing accelerating change and disruptive technologies on two fronts: helping adapt their corporate culture to the digital world and effectively serving staff and customers in a society where disruption, not just rapid change, has become the norm. Mix in Big Data and customer engagement, and you're in for a wild ride.

[1] Shane O'Neill, "4 Ways CIOs Can Unleash Digital Disruption," *InformationWeek.com* (June 21, 2013), **www.informationweek.com/global-cio/interviews/4-ways-cios-can-unleash-digital-disrupti/240157031**.

**Cinda Daly: Let's begin by talking a little bit about your roles at Pitney Bowes and the software division you represent. What's your charter?**

**Karen Lim:** Our software division is a combination of a number of company acquisitions, and I was actually part of an acquisition that occurred about seven years ago. My charter was, and continues to be, to create a holistic approach to the health and care of customers. From an operational perspective, that means that we look at all the customer-facing pieces in the back office that drive process improvement and service excellence. Chief customer officers don't often come with an operational team, so we're fortunate to have that combination.

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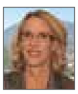

**Daly: When I mentioned to my friend Phil Verghis that I was looking for a "disruptive" leader, he immediately thought of you. What makes you disruptive?**

**Lim:** I don't think of myself as disruptive, but I do think of myself as a change agent. I've been in the software business for more than twenty-five years. I've always played that role, and I've always been aligned with customer advocacy in one way or the other, looking at the world from the customer perspective. A lot of my work seems like it's disruptive because I'm challenging the status quo all the time. I eventually win because it always comes back around to the customer.

**Greg Johnson:** When you listen to customers and you take the things they see us doing "wrong" and start to fix those things, the business realizes there's value in that pursuit.

**Lim:** We talk about disruptive technology and the constant disruption rapid change brings, but the challenge is not the change itself: it's how you embrace the new and reinvent yourself as an organization so you can meet the challenges around the corner.

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**Daly: Greg, as the worldwide software support director, how does this "disruption" impact your day-to-day responsibilities?**

**Johnson:** Like Karen, I joined Pitney Bowes seven years ago following an acquisition. Straight out of the gate, we had to work quickly to consolidate the software support organizations from all the companies that had been acquired. We gained traction that first year because the company bought into our strategy and appreciated our customer focus.

Our largest effort was consolidating the infrastructure and establishing standard global practices. The goal was to provide positive and memorable support experiences for our customers; to do that, we needed to have a knowledgeable and engaged staff. One of the key practices we established was providing a sense of ownership of the issues for our customers. Our people take responsibility and are accountable for driving customer issues through to a successful resolution. At the same time, we created a set of practices to make our customer interactions consistent across the globe.

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**Daly: How do your two roles—customer advocacy and worldwide software support—come together?**

**Johnson:** Our customer advocacy organization is very cross-functional; it looks across all of the roles in the organization that have a customer touchpoint. Karen is working to both optimize those channels and provide a customer-centric experience—that is, applying the "outside-in" methodology and looking at interactions with our organization from the customer's perspective.

From my perspective in software support, we're refashioning ourselves from a reactive organization and moving into a more proactive role. We're laser-focused on providing an experience for our customers that drives additional value, increases adoption, and makes sure that our customers see the return on their investment.

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**Daly: Greg, what is the operational scope of your service organization?**

**Johnson:** Our solutions run the gamut from software in the desktop-mapping space to enterprise platforms geared toward digital and physical communications. Implementations range from a few thousand to several million dollars.

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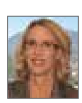
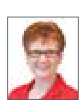


**Daly: How did you get buy-in across diverse organizations and cultures?**



**Lim:** Having a good infrastructure, with guidelines and boundaries that govern operations within it, is important. However, we were also very clear about our vision and direction, helping people understand what we were doing and where we were going as an organization, tying that to their jobs, and giving them common frameworks around which to work. These were fundamental things to have in place first. Once they were in place, it was easier to look at the nuances of each region.

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# The Daly Interview

**Daly: What specific strategies have generated the most change during this transition?**

**Lim:** Globalization and a common global support system created the biggest opportunity for us because of the collaborative nature of our global team. Everyone has the ability to share information and access individuals who have information that can help with a customer issue. Of course, we have follow-the-sun (24×7) support and all the rest of the basic features of global support. But the main thing is the collaboration, from consistency of usage and leveraging one standard operating practice to a common methodology and a common terminology. Those things have helped people collaborate even more—and much more effectively—than we expected.

**Johnson:** We refer to this as the "hive mind" mentality; it's almost like we share a brain, like worker bees in a beehive. We're focused on driving successful customer outcomes. In addition to owning that relationship, this also means that I'm going to interface with other people in the organization and farm my relationships with engineering and product management and others who may have the knowledge I need to serve the customer. We do that through our CRM and ticket management system, as well as through our knowledge management system.

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**Daly: Can you share a little bit about your knowledge management strategy?**

**Johnson:** As you would expect, we took on several different databases and knowledge-sharing philosophies as part of the acquisitions process. Two years ago, we began consolidating our existing knowledge systems and practices. We subsequently adopted the Knowledge-Centered Support (KCS) methodology and focused our efforts in both the call center and software support.

**Lim:** My vision is KCS for all, so we're driving KCS across all areas of Pitney Bowes. We're not being disruptive, but we are encouraging this mindset. Like many others, we have knowledge that isn't institutionalized. It's locked in the heads of the analysts and technicians walking around the halls. We have to create a hive mentality as people come and go. That's the ultimate goal, and I'm driving that broadly into the organization. Our customers expect us to be united and serve as one organization.

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**Daly: The software solution you provide is targeted right on some of the hottest issues in the business world: Big Data, content, and customer engagement. This in itself is a disruptive direction.**

**Johnson:** As the world becomes more disruptive, especially around technology, organizations have to change. Speed also challenges every organization. If you don't recognize that reality and stay ahead of the marketplace, you will have missed an opportunity. At Pitney Bowes Software, we're taking the necessary steps to make sure we are geared up and ready, positioning our products in a marketplace that includes physical and digital communication.

**Lim:** I'm not convinced it's the technology that's disruptive. Disruption comes back to the need for deeper customer insight. People who are losing market share have done so because they've allowed themselves to be commoditized. Businesses have to be sharper about how they interact with customers and distinguish their brand. That's the space we're in: helping our customers understand and communicate with their customers, gaining deep insight, and driving person-to-person relationships. A company's success is derived from its customers' successes. So, be interactive *and* individual. Provide something your customers value. This is the essence of success and the lifeblood of business.

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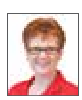
**Daly: As you look across your segments—small, medium and large global companies—what are the common threads you see in how your customers want to interact with Pitney Bowes?**

**Johnson:** I'm seeing rising expectations with regard to compressing the time it takes to resolve issues. Our customers understand that they're dealing with complex software and that their implementations are quite specific to their businesses. But they've also come to expect of a high level of skill from our team and a deep understanding of the business problems they're trying to solve. They simply expect us to do it faster than we have before.



**Lim:** The technology we have in place today should make it easier. So, it comes back to the three basic principles for taking care of customers: know who I am, care about me, and help me be successful. If you can apply those three principles and focus on meeting those basic needs, then you will prevail.

## ABOUT THE AUTHOR

For more than twenty-five years, Cinda Daly has managed teams, written dozens of industry articles and thousands of pages of technical documentation, developed training courses, conducted sales and service training, and consulted in the technical support and customer service space. In her current role, as HDI's director of content, she is responsible for HDI's virtual events, research, and print and electronic publications.

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# SYNERGY: ALIGNING TRAINING, COMMUNICATIONS, AND METRICS TO OPTIMIZE KNOWLEDGE MANAGEMENT

By Cindy Smith

If your service desk already has a great set of processes in place, good news:with just a little effort, you can reuse many of those same processes to optimize and improve your knowledge management program! After all, reuse *is* one of the main principles of Knowledge-Centered Support (KCS). There are four primary areas where you're probably already using service desk processes that can be incorporated into knowledge management: training, ticket management, communication, and reporting.

## TRAINING

You spend weeks training new analysts on your applications, processes, and ticketing system, but do you have specific training for searching, creating, and updating knowledge? In a recent HDI Research Brief on knowledge management in technical support, 33 percent of respondents reported that they don't provide formal training on searching their knowledge bases, while 43 percent reported that they don't provide formal training on entering content into their knowledge bases.[1] It seems very counter-productive to commit time and resources to starting a knowledge base and then not follow that up with training on how to use it.

Training is one of the keys to a successful knowledge management program, and an investment in knowledge base training, specifically, can pay great dividends in both the short and long terms. Just remember that, however you structure your training program, it should emphasize both searching and contributing: effective searching can result in reduced call times, lower resolution times (that is, faster resolution), and increased customer and analyst satisfaction, while contribution training can result in more usable knowledge contributions and a faster time to publish.

The best training approach is a multifaceted one, and one that you're most likely already using in your other training processes:

- An overview session
- Documentation:
  - The knowledge workflow, or how a submission becomes a published document

[1] Jenny Rains, "Knowledge Management in Technical Support," HDI Research Brief (April 2013), **www.thinkhdi.com/~/media/HDICorp/Files/Research-Corner/RC_Knowledge_April2013.pdf**.

- Search tips, including any advanced search features
  - Policies and expectations for searching and contributing knowledge
  - Knowledge document formats and features (including a style guide or formatting guidelines)
  - Policies and expectations for updating knowledge documents
  - Processes for viewing knowledge data and history in a ticket
  - Knowledge reports
- Shadowing and mentoring
- Follow-up coaching and training (as needed)

At my company, after a few days spent getting oriented, new analysts attend a one-hour training session with the knowledge manager. That training provides an overview of the knowledge base, expectations for the analyst's role in knowledge management, different components of the system and knowledge documents, and best practices for searching, updating, and creating knowledge. The analysts then shadow more-experienced analysts and ask questions; the more-experienced analysts, in turn, observe the new analysts using the knowledge and answer their questions.

Including basic knowledge management training in your new-hire training program will enable your analysts to hit the ground running—and they'll be more confident and more productive.

## TICKET REVIEW

Most service desks have a ticket review process that evaluates ticket quality by looking at accuracy, the quality of the description provided, and the documentation of the steps taken toward resolution. To make this process even more comprehensive, the knowledge criteria associated with the ticket should be evaluated as well.

Assuming your analysts link knowledge articles to their tickets, and that the activities in that process are tracked in a log, there are several knowledge-related processes in the ticket that you can and should review:

- **Was knowledge trail reviewed (that is, the knowledge trail established before the analyst received the ticket)?** If this wasn't reviewed, the analyst may suggest steps that have already been tried, which slows down resolution and frustrates the customer.
- **Was an appropriate search attempted?** If searches are too broad, they may not return closely matched results. In this case, your analysts may need more coaching and training to improve the quality of their searches *and* results.
- **Was the appropriate document linked to the ticket?** Verify that the analyst isn't just arbitrarily attaching documents in order to falsely increase the *percent of tickets closed with knowledge attached* metric.
- **Did the analyst email the document to the customer (if that feature is available)?** To simplify the support process, either provide the customer with instructions so they can follow along as the analyst walks through the steps, or have the customer perform the steps unassisted.
- **If an appropriate document was not found, was knowledge created?** Adding knowledge when none is found increases likelihood that the issue will be solved quickly the next time it arises (i.e., lower resolution time). In fact, if the knowledge is made available for self-service, the customer may not need to call at all.

There are two primary benefits to including knowledge information in the ticket review process: it increases ticket quality and it improves the knowledge process and the content in the knowledge base. My team performs regular random ticket reviews for all level 1 analysts, and we have a process for requesting a ticket review when a ticket may not have been completed correctly.

## COMMUNICATIONS

Regular communication and status updates keep customers informed and increases their overall satisfaction. Communicating knowledge-related activities can be equally beneficial, and like ticket notifications, many knowledge notifications can be automated, keeping participants informed on a variety of knowledge document activities. Some helpful knowledge communications include:

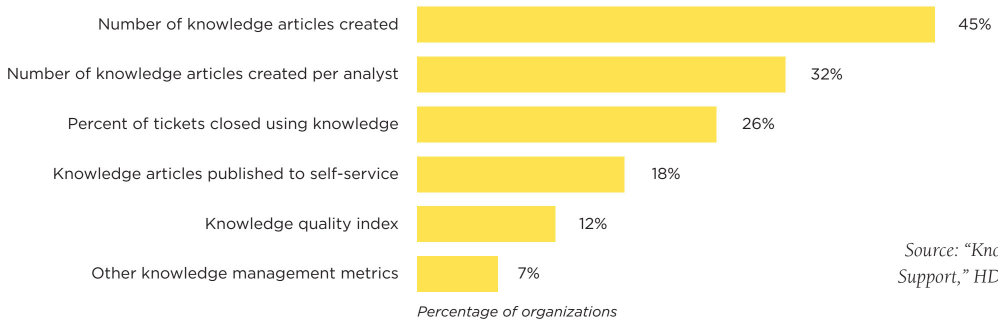
- **Document published notification:** These can be sent to both the document author as an acknowledgement and the owner as a notification that the document needs to be reviewed.
- **Document to approve notification:** If you have an approval process, this notification should be sent to the document owner for approval before publication.
- **Document retired notification:** This should be sent to the document owner.
- **Comment received notification:** This should be sent to the document owner so that he or she can respond to the comment and update the document, if necessary.
- **Lists:** Lists can be used to communicate information, and your system may be able to autopopulate these lists. For example, you might include a *Top Documents* list, so documents can be accessed without searching, or a *New Documents* list, so analysts can become familiar with documents before they're needed during a call.
- **Replies:** Reply to comments and suggestions from customers and analysts. Acknowledge the source, let them know what was done with their idea, and recognize their contribution. One way we do this is by forwarding the comment to the author and the author's manager.

Consistent communication about knowledge keeps people informed, engaged, and aware of your processes and the important part people play in the knowledge management ecosystem.

## REPORTING

In addition to your no-doubt wide range of reporting related to service desk tickets, phone statistics, customer satisfaction data, and dozens of other metrics, reporting on knowledge can be an invaluable tool for showing progress, identifying areas

## THE MOST COMMON KNOWLEDGE MANAGEMENT METRICS




*Source: "Knowledge Management in Technical Support," HDI Research Brief (April 2013)*

for improvement, and illustrating the ROI of your knowledge implementation in terms of increased support productivity and decreased support costs.

Knowledge metrics can be broken down into the following categories:

- **Document attributes and measurements**
  - Lifecycle dates (create, publish, review, retire)
  - People and groups associated with the document (author, owner, subject matter expert)
  - Usage (hit and attach counts, last hit and attach dates)
- **People search and contribution measurements**
  - Documents by author
  - Comments by author
- **Process measurements**
  - Call deflection
  - Percent of tickets closed with knowledge attached
  - Time to publish
  - Documents past review date
- **Baseline and trends**
  - Number of documents
  - Percent of tickets closed with knowledge attached
  - Search trends
  - Self-service usage

Most knowledge metrics need to be looked at together to provide an accurate picture of your knowledge performance. While the top knowledge metrics usually involve quantities, those numbers alone won't tell the complete story. Whether you have 1,000 or 100,000 documents in your knowledge base, it really doesn't matter unless you can combine the number of documents with the percent of tickets closed with knowledge and the percent of documents used at least once.

For example, if you have 1,000 documents and you close 75 percent of tickets with knowledge, that looks very good on the surface. But if you also can also see that you've only used 20 percent of your published documents at least once, your organization has likely spent a great deal of time on documents that aren't useful, and these documents should be reviewed.

However, even apparent successes should be scrutinized, both to verify that the knowledge is benefitting your organization and to determine whether your performance can be improved upon. For example, if *percent of tickets closed with knowledge attached* is very high, you may want to consider involving problem management to see if you can eliminate redundant issues.

Analyzing searches and hits can also indicate whether the information in your knowledge base is easy to find. Note the ratio of customer searches to hits; if customers have to run an average of more than one or two searches to get a hit, you may want to more closely analyze the data and tweak your documents. One way to lower the ratio is to have documents available without having to search. For example, when you're rolling out a new solution or service, provide a list of *Top Documents* or *Announcements* that link to relevant knowledge documents.

Finally, pay close attention to two key metrics: *percent of tickets closed with knowledge attached* and *call deflection*. *Call deflection* is a great way to quickly calculate the ROI on your knowledge management initiative. The Consortium for Service Innovation's "KCS Practices Guide" recommends comparing document hits by customer with tickets received within a certain time frame and counting the hits without a ticket opened by the customer as a self-service success; my team calculates this metric using a 24-hour window. *Percent of tickets closed with knowledge attached* is another important metric that can be used to calculate ROI, in this case by reusing known information to save time and to verify that the knowledge base is being used effectively.

Knowledge management metrics provide a great deal of valuable information about your implementation and are especially effective when combined with training, ticket review, and communications processes. You can achieve this synergy with little to no effort by simply leveraging the processes you already have in place—it's that easy!

### ABOUT THE AUTHOR

Cindy Smith is the senior knowledge manager at McGladrey LLP. She has more than fifteen years of experience developing and managing corporate IT service desk knowledge bases. Cindy is HDI-certified in Knowledge-Centered Support principles and is also the VP of communications for the HDI vChapter.


# Good Practices: Hiring Contractors for Projects

**By the Members of the HDI Desktop Support Forum**

During one of our exercises at the HDI Desktop Support Forum meeting this past June, we discussed whether it was a good idea to hire contractors for projects. It quickly became apparent that we felt that bringing contractors in to assist desktop support in *defined circumstances* could be very beneficial. Once that was settled, we were able to hash out the set of good practices documented here.

*Contractors* should not be confused with *consultants*. Contractors act very much like temporary employees, and the hiring process is similar. Consultants, on the other hand, are brought in "when the company has a need and either isn't able, doesn't wish to, or doesn't know how to take care of it—and doesn't have the time or desire to figure it out."[1]

The HDI Desktop Support Forum members agree that contractors can provide value in projects—by adding a skill not present on the team, by providing basic labor for less-valuable tasks, or by "backfilling" the desktop support team's day-to-day tasks to free team members up for project work—but that they aren't suitable for all projects. There also needs to be a defined set of tasks, good communication in all directions, and clear courses of action at every stage of the project.

The desktop support manager and the project manager—assuming they're different people—need to define especially clear roles and communication channels before hiring contractors for a project.

## Assumptions

In framing our debate, we made the following assumptions:

- Projects run for a specific span of time (by definition).
- There is money in the project budget to cover contractors.
- Hiring contractors is permitted by the organization.

## Types of Contactors

Generally, contractors fall into one of two categories: either individuals (independent contractors or temporary hires from a staffing firm) or companies whose employees will augment your existing staff. If you need a group of contractors with similar skills for your project, bringing in a company is usually the best option, and there are several distinct advantages. Third-party contractors typically wear identifying clothing, such as polo shirts, which visually separates them from your internal staff and can help minimize fallout from any less-than-desirable experiences. And if there is an issue with a particular member of the contractor's team, a phone call to the company saying, "Don't bring X with you when you come back tomorrow" is usually sufficient. As with any engagement, make sure that you obtain references from other customers who've had similar work done.

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[1] Meredith Little, "The difference between contracting and consulting, and why it matters," *TechRepublic.com* (March 4, 2009), **www.techrepublic.com/blog/it-consultant/the-difference-between-contracting-and-consulting-and-why-it-matters-125429**.

Individual contractors, whether independent contractors or from a staffing firm, should be interviewed in a manner similar to prospective employees: Will they be a good fit on the team? If you had a position open, would you hire this person? (Incidentally, bringing in contractors is one way to get a "try before you buy" experience with staff.) Although bringing in individual contractors may require more work on the part of managers (group, department, or project), there are several advantages:

- If your project is currently lacking specific skills, you can bring in individuals that have those skills. In such cases, a method of knowledge transfer should be ready so that a contractor's skills and knowledge can be retained when he or she leaves.
- If your project requires specific certifications, you can bring in individuals that have those certifications without absorbing additional training and certification expenses.
- If the project entails work at a site or sites not convenient to the internal team, you can enlist contractors near the target location to fill the gap.
- Internal managers will likely have more supervisory control over individual contractors.

## Some Projects, but Not All

Not all projects or project tasks are suitable for contractors; some are better handled by staff. The use of contractors is advisable when:

- There is a high volume of low-level work, such as unboxing computers during a hardware refresh
- Specialized skills are needed for the duration of the project
- You need to augment your current staff:
  - To release staff for project work while contractors perform day-to-day tasks
  - To accommodate changes in workflow (i.e., peaks and valleys in demand) during the project
  - To shorten the project timeline
  - To cover geographies the staff team can't reach

On the other hand, contractors are probably *not* suitable for projects that:

- Require high customer "touch"
- Require or occasion exposure to confidential information
- Require work in mission-critical areas where security, safety, and/or regulatory compliance are of high concern
- Require a deep knowledge of the organization's culture

## Ensuring Success

As with any project involving multiple groups, clear and defined communication between the group, department, or unit managers and the project manager is essential. Use a RACI matrix to clarify roles and make lines of communication easier to identify and establish.[2]

From the outset, the project plan should define the number of contractors required, the necessary skills, the location(s), the beginning and ending dates for the work, the required tools, the hours of work (e.g., night or day), and the transportation requirements (including any reimbursements for travel).

Contractors' fees or wages should be negotiated or determined by the hiring organization, usually by HR or with its involvement or control. Background checks should be performed. If the contractors are being hired through a staffing firm, that firm should assume responsibility for these checks. Any credentials—such as certifications—should be verified as well.

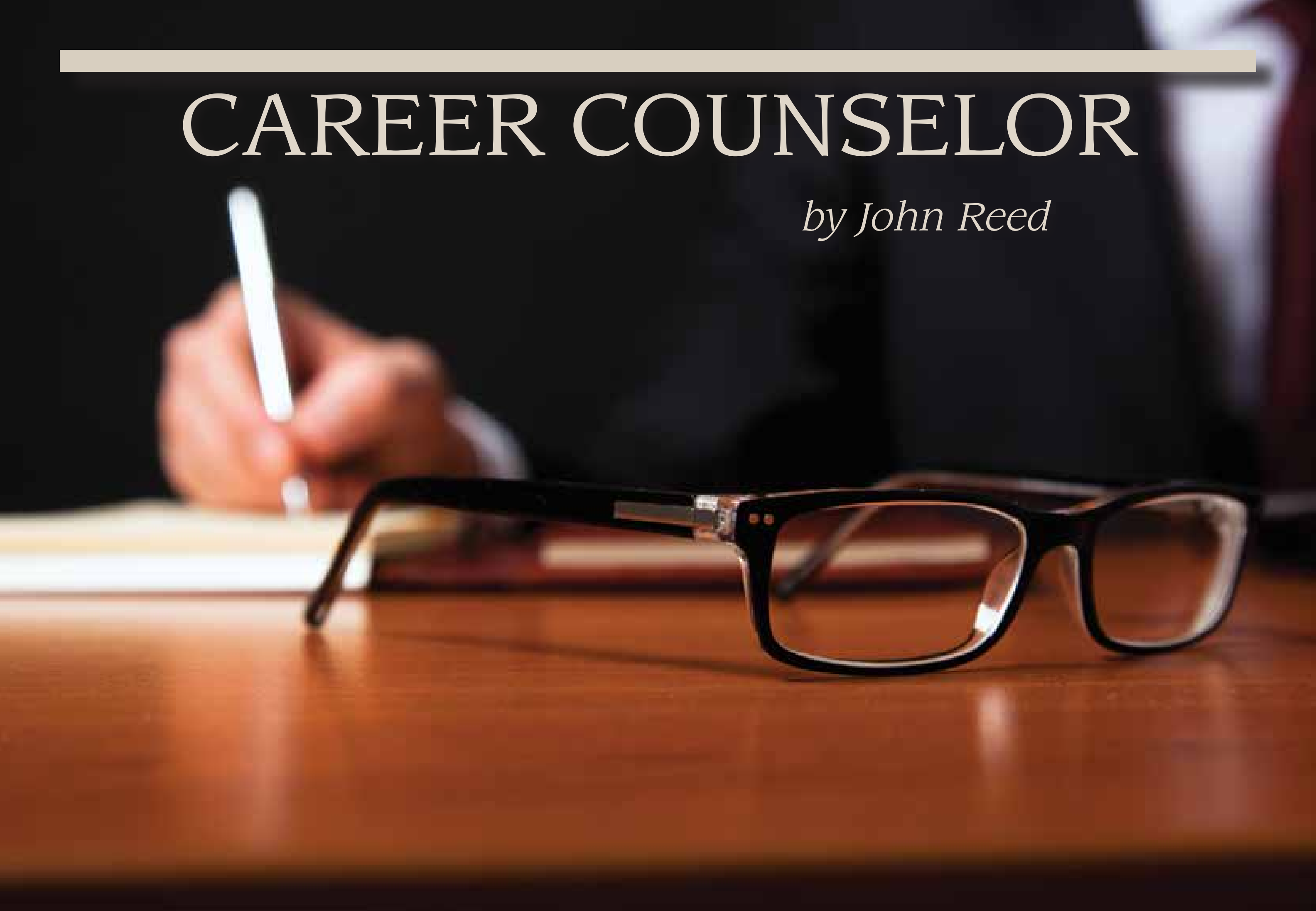
The onboarding process for contractors is similar to that for incoming employees. The organization must provide all necessary equipment (such as an organization-owned computer) as well as any required accounts (such as email) and access to appropriate internal resources. The organization must also provide whatever training might be required (e.g., safety). Detailed checklists can be used to track the completion of required project tasks, and these should be checked for both correctness and completeness before they're delivered to the contractors.

Once the work begins, contractors should be closely supervised by staff, and staff should be readily available to answer questions and provide direction. The contractors should be making regular contributions to the organization's knowledge repository, and they should be providing detailed status reports at defined checkpoints during the project.

Contractors should be debriefed at the end of the project to determine what went right, what went wrong, and what could have been done differently and/or better. Any personnel issues encountered during the project should be documented in writing, and any responses from the staffing firm or the contracting company should also be in writing, if applicable. These issues, if any, should be dealt with as rapidly as possible so as not to derail the project or sow discord among members of the extended project team.

Project progress and outcomes should be reported up to senior managers and out to the extended teams so there is a transparent record of the work, the methods, and the people. Any open issues should be resolved by the end of the project, including any work remaining. It is then the project manager's responsibility to ensure a smooth transfer out of the project phase and into operation.

[2] For a good explanation of RACI, see Shannon Nevin's "How a RACI Matrix Can Help Your Project Succeed," Cardinal Solutions (June 21, 2012), **www.cardinalsolutions.com/blogs/requirements/2012/06/how_a_raci_matrixca.html**.



# CAREER COUNSELOR

*by John Reed*

**Q:** What are the perks/benefits that promote retention and attract new talent?

**A:** Let's start with the reality: Competition for IT talent is intense because technology is central to the operations of most any modern business. There's also growing demand for professionals with specialized skills. Technical support centers are among the organizations looking to hire candidates with diversified skill sets, according to *The Technical Support Center of the Future*, a research report from HDI and Robert Half Technology. But they, and all other employers seeking skilled IT talent, face a shortage of qualified candidates available for hire.

Some employers try to woo candidates with generous compensation packages and a range of impressive incentives, from free gourmet meals and house-cleaning services to on-demand cars and unlimited vacation time. Without question, brag-worthy benefits can make a big difference in your efforts to hire some IT professionals with in-demand skills and certifications. But there are many candidates looking for more than just "cool factor" perks when weighing job opportunities. Here are some examples of incentives that may not grab headlines, but likely will be highly valued by both potential hires and IT staff already working at your firm:

- **Flexible schedules:** Businesses demand 24×7 support for technology, which means nontraditional work schedules are increasingly the norm instead of the exception. That can interfere with employees' work/life balance. Fifty-one percent of professionals polled for a recent CareerBuilder survey said that flexible schedules are the key to employee retention, and the number-one perk they pointed to when asked what would make their jobs more satisfying was the freedom to take half-days on Fridays.
- **The work-from-home option:** This perk relates to demand for flexible schedules, of course. If your organization allows its IT staff members to work remotely on a regular basis, it's definitely something to mention during the hiring process: according to a recent survey by Robert Half, three in four IT workers consider the telecommuting option to be at least somewhat important when evaluating a job offer.
- **Opportunities to grow:** For technology workers, keeping their skills and knowledge up to date is not just a desire but a necessity in this fast-evolving profession. Sixty-eight percent of IT workers surveyed by our firm said the ability to acquire new skills is very important when evaluating a job opportunity. Additionally, 64 percent

of respondents said they're very concerned about keeping their skills current over the next three to five years. Many employers today offer at least partial reimbursement for professional development and educational opportunities for their IT staff. It's an investment that can give any firm, large or small, an edge when recruiting IT professionals. (Plus, keeping your IT staff well trained creates competitive advantages for your business.)

- **Maximize the interview:** The opportunity to set the tone and plot an incentivized career course begins at the job interview. Nothing has to be set in stone at this early stage, but starting a dialogue with potential employees—and keeping it going once they're hired—will help you set relevant goals and provide meaningful rewards that will engage, challenge, and fulfill your IT staff members.

## Q: Low morale leads to higher turnover. How can we reverse that trend and increase retention?

**A:** Low morale has different causes and takes different forms. While some disgruntled employees may try to "tough out" the situation (which can perpetuate the problem), others—especially top performers who can more easily find job opportunities in a competitive market—may leave. That's why it's essential for supervisors to keep their ears and eyes open for signs of low morale. In fact, supervisors may be the very cause of the problem. Several management missteps that trigger employee unhappiness include:

- **Keeping them in the dark:** Employees understand that they can't be privy to all the company's top-level conversations and business intelligence. But if a major development is in the works—like a merger or the sale of a business unit—managers need to provide as much information as they reasonably can to their teams, preferably in face-to-face meetings. Let them know what's happening and how it may affect their work and their jobs—and be transparent if there's any uncertainty.
- **Being too hands-on or too disconnected:** Managers tread a fine line between help and hindrance. Those who get too involved in the work risk micromanaging; those who are too removed don't know what it takes for employees to do their jobs and often overlook problems. Know when to empower staff to make decisions and follow their own process to complete a project, and when to roll up your sleeves and pitch in to assist them.
- **Overlooking burnout:** Across all industries and disciplines, employees have spent the past several years doing more with less. As a manager who's overworked yourself, you may miss the signs that your team is at a breaking point. Keep an eye out for derailed deadlines, interpersonal conflicts, and attendance problems among an otherwise high-performing team.

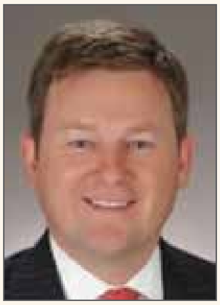
In addition to avoiding missteps that can derail a team's morale, managers can play a proactive role in maintaining a collegial, supportive, productive work environment. Take these steps to create an open, two-way communication channel that keeps them connected and content:

- **Stay engaged:** It isn't enough to maintain an open-door policy; it's also important to actively reach out to employees. Take a daily walk through the office to chat with team members. Ask them if things are going well or if they need your help. Pay attention not just to what you hear but also to what you see. Is an employee who's normally friendly unusually curt? Are people collaborating or arguing? Watch for signs of stress among the team and quickly identify any problems; you can't fix a morale problem if you don't know it exists.
- **Schedule regular check-ins:** To keep top performers satisfied, you need to uncover their unfiltered opinions of the company, their roles, and their leaders. Make time for consistent, regularly-scheduled sessions where they can share their concerns and challenges. Ask them if they have the tools and knowledge they need to do their jobs. Don't let "My boss never listens to me" be the reason a valuable team member leaves.
- **Create a progressive career plan:** Meet with your most-skilled staff to identify opportunities, such as mentoring and membership in a professional organization, that can develop their skills and make them feel connected to the company's growth. Demonstrate the company's potential for advancement by hiring from the inside whenever possible. Employees who foresee a positive career path are more likely to stay on board.

Click here to hear more of John's insights on retention.

### ABOUT THE AUTHOR

John Reed is senior executive director of Robert Half Technology, a leading provider of technology professionals for initiatives ranging from web development and multiplatform systems integration to network security and technical support. Robert Half Technology offers online job search services at **www.RHT.com**.



# Five Issues You Can't Afford to Ignore in 2014

Mobile devices and mobile apps, the hybrid cloud and the personal cloud, Big Data, the Internet of Everything and software-defined anything, web-scale IT, smart machines and 3-D printers: these are just a few of the strategic technology trends on the horizon. Technical service and support organizations either have been, are being, or will be tasked with supporting these new technologies, and this will require innovation, flexibility, and new support paradigms. If you aren't already thinking about these issues, this is no time to put your head in the sand.

The articles in this feature focus on just a handful of the trends that will affect (or continue affecting) the technical service and support industry in 2014. Charles Araujo explains how customer expectations have changed and why we need to change our approach to managing the customer experience. Heidi Cook dissects the mobility challenge from the perspective of a major healthcare provider. Brian Madocks shares his vision of a future where the enterprise help desk is a hybrid virtual and physical help center. Eveline Oehrlich and David K. Johnson explain why virtualized applications and the service desk are a match made in heaven. And finally, Alan Berkson tells us why we can't dabble in multichannel support, we must commit!

What are some of the challenge, opportunities, and trends on your radar? Tell us at **www.HDIConnect.com**!

# Moments of Truth: The Future of the Customer Experience

By Charles Araujo

In 1955, something happened in California that would change how we approach the world of IT some sixty years later. That year, Walt Disney unleashed his spectacular vision on the world in the form of Disneyland. It was unlike anything the world had seen before. Disneyland had a visceral effect on people. We were able to escape the reality of day-to-day life and enter a special world in which everything was good and we could imagine the world as it should and could be. It was, as Walt said, "the happiest place on earth."

The opening of Disneyland was a watershed moment for the entertainment and theme-park industries, but it also set into motion an idea that would eventually permeate every facet of life in the western world—an idea that is now having a significant impact on us as IT professionals. Ignore it at your peril, because it will come to define everything about how we work going forward: People don't buy a product. They buy an *experience*.

Before Walt opened the doors to the Magic Kingdom, there was no real concept of the *engineered customer experience*; people simply bought products. Likewise, while a more robust sense of service began to develop during the 1940s and '50s, that was more a factor of culture than intent. But Disneyland wasn't just a product with great service. From top to bottom, it was designed to create exactly the experience that Walt himself envisioned that you have. That vision was so powerful, in fact, that it's still almost exactly what we experience today when we visit the Disney parks.

Walt was right. People loved the idea of purchasing an *experience*. They loved buying the feeling they got when they crossed the threshold and stepped onto Main Street. People loved it so much, in fact, that they began to seek similar experiences. Today, whether it's the Harley Davidson store, a themed restaurant, or the Apple Store, people want experiences, and they're rewarding those organizations that can deliver them. And thanks to Apple, Google, and many other consumer technology companies, people are now looking for the same type of experience from their IT organizations. Welcome to your future.

## Our World Has Changed

In *The Quantum Age of IT: Why Everything You Know About IT Is About to Change* (2012), I describe three market forces that I believe have changed the world of IT for good. One of these is what we now call the "consumerization of IT." This is the idea that as consumer technologies have become more pervasive, they've changed our customers' perceptions about how they should be able to interact with both their technology and their service providers.

In the world of IT, that's us.

Our customers' view of us and how we should interact with them has evolved, and it's forever changed our relationship with them. The challenge is that, in many cases, we haven't realized it. It's why so many organizations are scratching their heads trying to figure out why their customers seem to be less and less satisfied with their services each year, even though they feel as though the quality of their services is getting better. Perceptions have changed. Relationships have changed. The rules are different.

The problem is that organizations still believe they're delivering a service (i.e., a product), but their customers are actually buying experiences.

## The Customer Equation

One of the Four Pillars of IT Transformations is something we call *the customer equation*. It's a simple construct, and it goes like this:

If you want to have a positive, trusting, and productive relationship with your customer, you need to be focused on two things: delivering customer value and delivering a positive customer experience.

Having a happy customer means solving for both parts of this equation. Are you delivering the value that you promised? Are they getting something from their IT investment that's meaningful to their business? That's the first half of the equation. And in many cases, it's the only part IT organizations ever focus on.

The challenge is that, as IT professionals and as service providers, we're no longer judged solely by the value of our services (and I'm not sure we ever were). We're also not judged by some discreet element of a service transaction. We're judged by the totality of our customer's interaction with us—and, increasingly, the shared experience with other customers. Our customers have come to expect a total customer experience. And they're going to get it, one way or the other. So you'd better understand what it looks like.

## The Four Moments of Truth in the Customer Experience

The good news is that you implicitly understand what the customer experience is all about. Why? Because when you put on your "consumer hat," you most likely have the same expectations; for example, a restaurant can have great food, but if the service and ambiance are lacking, you probably won't return. We've all come to expect a complete customer experience, but you may not have given much thought as to how that experience is actually put together.

In *What's the Future of Business* (2013), Brian Solis identifies what he calls the Four Moments of Truth that define the complete customer experience. It's important to understand each of these Moments of Truth as you contemplate your role in IT service delivery.

- **The Zero Moment of Truth (Discovery)**: Coined by Google, the very first moment of truth is when a customer has an unmet need and is seeking a solution. They begin to search for potential options and alternatives.
- **The First Moment of Truth (Exploration)**: Coined by Proctor & Gamble, the second step of the experience is the one in which the customer actually interacts with you and/or your product or service. What is their first impression? Does the product speak to their needs?
- **The Second Moment of Truth (Consumption)**: Also coined by Proctor & Gamble, the third step of the experience is after the customer has elected to purchase your product or service and is now using it and experiencing it. This moment lasts as long as the customer is engaged with the product.
- **The Ultimate Moment of Truth (Shared Engagement)**: Coined by Solis, the final (or "ultimate") moment of truth is when customers share their experience with others who are often experiencing their own Zero Moments. This influence loop generates a powerful force of either growth or destruction, depending on how positive or negative the customer's experience has been.

These Moments of Truth were obviously developed from a marketing perspective and were designed to explain the process by which people make purchasing decisions. So you may be thinking, *What does this have to do with IT?* But the truth is that in this new era of IT, our customers *have choices*, and they're making purchasing decisions every time they choose to deal with us. When you look at our industry, at the business of providing IT services, you'll see that virtually all of our efforts are invested in the Second Moment of Truth, the experience customers have with our product or service. But their experience with us starts long before that moment.

The first point at which the customer begins to form opinions about any organization is when they don't even know it exists, when they're only focused on the problem they're facing, not the solution (the Zero Moment of Truth). IT's customers are in the same situation. They have problems, and they want to know who else has faced the same problems. They're looking for paths that might lead them to solutions. Are you even involved in that conversation? That's where the customer experience begins, and IT must learn to engage at that stage.

Once customers are ready to engage with us, even if they didn't have a choice in the matter, we face the second stage of the customer experience: the First Moment of Truth. During that very first interaction, when a customer is simply trying to find a solution, when they're exploring your products or services and trying to understand how you can help them, what kind of an impression are you making at that moment? Have you ever tried to request or acquire one of your own products or services? Was the process simple? Intuitive? Personal? Human? As IT professionals, we need to treat this second stage of the customer experience as if our careers depended on it—because it does. If customers find it difficult to do business with us, they'll simply go elsewhere. So, how are you designing the process by which your customers can explore your products or services and then actually acquire them? (If you think it's as simple as implementing a self-service service catalog, you're in for a very rude awakening in the not-too-distant future.)

The third stage of the customer experience (the Second Moment of Truth) is where we spend most of our time: the actual consumption and use of the product or service we're delivering and the customer's experience with that process. The challenge we often have in IT is that we believe the different elements of the actual service delivery can be isolated and are experienced or evaluated independently. They can't and aren't. You can ask me how my experience was when I called the service desk, and if the agent was friendly and solved my problem, I may tell you that my experience was good. But that doesn't mean that I'm happy. If I have to call every week because the service isn't reliable, or because an application was designed poorly and is making me work twice as hard as I should have to, or if everything runs slowly, or if…you get the idea. My *real experience* with the consumption and use of a product or service is the totality of those isolated events. I don't separate the pieces in my head, and neither do you. None of us do. Yet what do we do in IT? We ask our customers about just one small slice of their experience with a service or product's delivery, and then we wonder why those responses don't seem to line up with the complaints we hear.

This leads us to the Ultimate Moment of Truth: the shared experience. Solis's point was simply that we are becoming increasingly comfortable with sharing our experiences with others and basing decisions on those shared experiences. When was the last time you chose a new restaurant without first checking out the reviews on Yelp, UrbanSpoon, or TripAdvisor? This type of social community exists within and between our organizations as well, in person and online. What are you doing to create open opportunities for these shared experiences, so that you can learn from them and engage in the conversation? We must recognize that these conversations and shared experiences will have a massive effect on our customers' experience with us. You can't fight it, but you *can* create an open platform for these conversations; you can listen, you can engage, and you *can* make those shared experiences more positive.

## Your Future IS the Experience

As IT professionals, this conversation about the customer experience and Moments of Truth may feel odd and uncomfortable. You're in IT, not marketing, right? The truth is, as we move into the new era of IT, it will be all about the experience. You simply cannot afford to ignore this reality: Every moment of every day, before you ever even interact with them, you're a part of your customer's experience with the IT organization. You need to realize it, remember it, and then ask yourself, *What can I be doing right now to improve the customer experience at each Moment of Truth?*

### ABOUT THE AUTHOR

Charles Araujo is the founder and CEO of The IT Transformation Institute and author of *The Quantum Age of IT: Why Everything You Know About IT Is About to Change* (2012). An expert in the areas of IT transformation and IT organizational change, Charles is the creator of DeepRoots, an organizational change methodology for IT teams. He also serves on the boards of itSMF USA and The Executive Next Practices Institute, is a regular contributor to *CIO Insight*, and has been quoted or published in ZDNet, IT Business Edge, TechRepublic, *SupportWorld*, Computerworld, *USA Today*, and *Time*.

# Health Check: The Challenge of Mobility

By Heidi Cook

Thousands of people pass through Floyd Medical Center facilities every year: patients, families, staff, and physicians, all of whom either want or need to access their data and applications whether they're on the hospital grounds or at one of the surrounding campuses. The growing mobility trend presents many challenges for IT management and staff in the healthcare field, and government regulations (plus the hefty fines that result from violating those regulations) ensure that patient privacy is at the top of everyone's minds when developing mobile solutions.

Whether it's a doctor who wants to review a patient's record on her iPad or a patient who wants to check Facebook while waiting for his lab results to come back, the FMC network is accessed thousands of times each day. The challenge is segmenting that user population so that access is granted to those who need it, when they need it. BYOD, mobile device management (MDM), and network access control are just a few of the initiatives FMC will be launching in FY2014 to manage and regulate this access. Network access control, through products such as Cisco ISE, will allow IT to monitor and segment traffic as soon as users access the FMC network. Alerts, based on defined policies, will be used to revoke or redefine access as needed, and users will be required to agree to FMC's terms and conditions before connecting to any access points. Welcome screens will also be tailored to users based on their location in the hospital, providing information our customers need as soon as they log in to their devices. This customization will provide patients, visitors, staff, and physicians with a unique experience that will enhance their perception of the value they receive from being treated at or working for FMC.

Once a user is on the network, the applications they're using on their devices must also be monitored and controlled. Mobile device management solutions, such as Airwatch, will give FMC the technical means to monitor device access, with policies tailored to FMC's specific needs and the realities of the hospital environment. For example, FMC will be able to establish groups that grant or restrict access to certain applications based on a user's job title in the Active Directory, allowing doctors and nurses to have different access than, say, a custodian; the same solution will give FMC the ability to immediately restrict access when employees leave FMC. MDM solutions will also permit FMC to "containerize" applications within the device, granting or revoking access rights and privileges as needed. Additional security measures, such as disabling the screenshot function on a device when accessing applications that contain personal health information, will ensure that patient records aren't compromised. Finally, network traffic will be segmented based on need. For example, video-streaming applications, such as Netflix, won't have as high a priority (i.e., share of bandwidth) as clinical applications that are directly related to patient care.

Security is always of the utmost importance, but it has to be balanced with usability. New policies are always thoroughly tested before being put into production to ensure that the right people continue to receive access to the information they need. However, further complicating matters is the growing demand from FMC employees for BYOD privileges. BYOD initiatives *do* save organizations tens of thousands of dollars in equipment purchases, but they also bring with them a host of security issues that must be thought through before rolling out such programs. One such issue involves using personal devices to access records and private data on the internal network. As part of our MDM policy, FMC will require employees to agree to terms and conditions that include the ability to remotely wipe devices in the event of a potential data breach, such as a lost or stolen phone. These terms will also establish boundaries and guidelines for balancing management of corporate data with access to personal data. FMC IT staff will do their best to be minimally invasive when managing personal device, and if an event occurs that requires wiping of a device, they will do what they can to leave the user's personal data intact.

As more and more users access the FMC network, each campus must expand its wireless capabilities to ensure that critical access points can absorb the demand. Each access point (AP) can only support so many devices, so as more users try to access the network, more APs will be required. FMC IT staff are constantly surveying and testing for dead zones, and we've installed monitoring equipment that will notify management of signal degradation in the hospital and at satellite locations. Back-end infrastructure, such as data pipes, must also be equipped to handle growing demand for bandwidth. Infrastructure growth is a rolling target that FMC management strives to maintain so that all of our users receive consistent, reliable service, wherever they go.

All of the tools, technologies, and policies above must work together to create an ideal environment. If one piece of the puzzle is out of alignment, then a patient might not get the care he or she expects from FMC. The ultimate goal is a fully-connected environment that combines the strengths of mobility with security settings that allow users to go exactly where they need to go, and no further. In the future, FMC plans to implement unified communications, which roll voice, video, and messaging together into a single solution that provides a seamless user experience. Video conferencing will help FMC save both time and money when it comes to off-site meetings and professional development, while soft phones, or phones that are operated from a user's computer, will allow users to make calls from anywhere in the world without physically being at their desks. Finally, instant messaging will give users the ability to share their desktops and documents with coworkers and receive quick answers that speed up the decision-making processes without the need for an in-person meeting. The possibilities are truly endless, and FMC is committed to giving its users the best, most secure care and service possible.

Whether your business is communications, manufacturing, retail, or fast food, there are lessons to be learned from healthcare's approach to the mobility challenge. In healthcare, our users make life-and-death decisions every day, but even in industries where life and death aren't on the line, businesses still want to see that support is adapting and evolving, making decisions and providing services that improve the bottom line. Mobility is truly one of the first critical steps on the path to success in the new world of IT, and if your organization hasn't already taken that step, it should in 2014.

## ABOUT THE AUTHOR

Heidi Cook is a certified Project Management Professional who has been with Floyd Medical Center since February 2013. Heidi came to the healthcare industry from the telecommunications industry, where she spent more than nine years. Heidi received her BS in information technology and marketing from Virginia Tech. In her spare time, she enjoys riding and training horses for rodeos and other competitions.

# Help Centers: The Future of Enterprise IT Support

By Brian Madocks

Imagine a future in which the enterprise help desk is not a desk or a physical department, but a hybrid virtual and physical *help center* with a very different composition of resources available to support business users. Imagine IT support teams closely aligned with the various business units, teams that include business-savvy IT consultants who advise lines of business on the best technology solutions for their specific needs. Imagine these help centers as highly attuned and responsive to individual business user needs, and highly commended and valued by the business. Can you see it?

In this future state, IT and the support organization are front and center, playing a critical role in continuous enterprise productivity enhancement. And, in fact, this vision is a reality for some organizations today. Strategic CIOs, with support and buy-in from their executive teams, are creating this type of environment, and continually evolving their support organizations to provide the right support in the right way at the right time.

In these new models, there are:

- Desktop support resources and more traditional help desk resources physically colocated with key business users, within a specific department or building, in one form or another—even specialists who know the business and can provide more proactive support and consultation. In a July 2012 research note ("Reinvent Your IT Frontline Capabilities"), Gartner stated that "some CIOs and infrastructure and operations leaders are reshaping their traditional, reactive, and technology-oriented IT Service Desks (ITSDs) into proactive business productivity teams."[1] It's worth noting that in some industries, such as securities and investments, this idea of resources sitting within the department has been in use for many years, and they should be used as a reference point for this new help center model in other industries.
- Virtual support resources available to provide anytime, anywhere support for highly mobile or remote users.
- A mix of service delivery tools and capabilities, including desktop support, white-glove user support, text, chat, social, and others yet to come.
- Support personnel with varying degrees of expertise spanning traditional hardware and new form factors coming to market, traditional applications and new specialized apps (including proprietary apps specific to the company and key lines of business), and platforms. The future enterprise will have all of these elements within its environment, on a rapid and continuous refresh cycle, and a corresponding need to support the workforce using these tools.
- Support personnel and leadership with a unique set of skills and personality traits, including technical skills as well emotional intelligence and customer service skills.

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[1] Other reports in this series include "Best Practices for Conducting the Business Productivity Team Proof of Concept" (September 2012) and "Four Keys to a Successful Business Productivity Team Implementation" (April 2013). Visit **www.gartner.com** to learn more.

could drive substantial innovation." The business-responsive help center of the future will be a source of information—a window into the business—for the broader IT organization to see opportunities for innovation.

- Resources that may come from a combination of internal staff, contractors, and third-party sources, in a flexible staffing model that enables agility, timely capacity adjustments, and rapid response to existing and emerging needs.

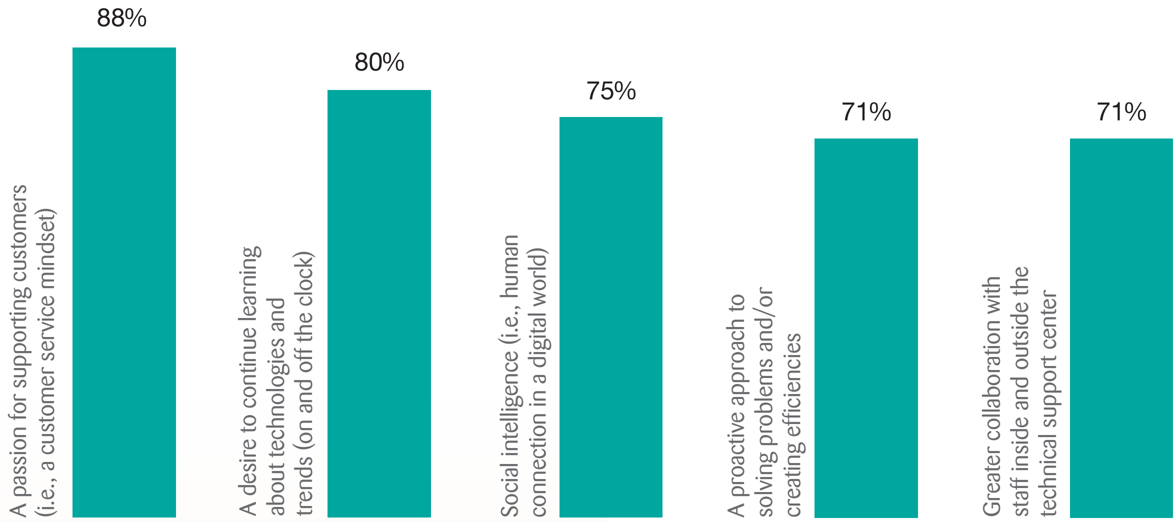
Future support organizations will have to be agile and nimble, open to change, and ready to deliver innovations to the business. In an April 2013 Gartner research note ("Bring Your Own Device: The Facts and the Future"), David Willis suggests that IT groups "look for opportunities throughout the entire workforce where mobility could drive substantial innovation." The business-responsive help center of the future will be a source of information—a window into the business—for the broader IT organization to see opportunities for innovation.

## Staffing the Future Help Center

To implement the help center concept described above, organizations will need to be creative in staffing, training, coaching, evaluating, and developing their personnel. One overarching conclusion noted in HDI's June 2013 research report, *The Technical Support Center of the Future*, was that "the ability of IT support teams to provide an outstanding level of customer service will be important to helping organizations and their employees understand how to appropriately leverage both known and emerging technologies in the business. IT support teams will also be instrumental in helping organizations find new ways to use technology to streamline operations, reduce costs, and better meet the needs of end users."

The report also noted that "in order to continue delivering value to the organization and moving in new directions as business needs dictate, technical support professionals will need to wear many hats. Therefore, perhaps the biggest changes on the horizon for the technical support industry will be less need for those who are highly skilled in just one or two technical areas and greater

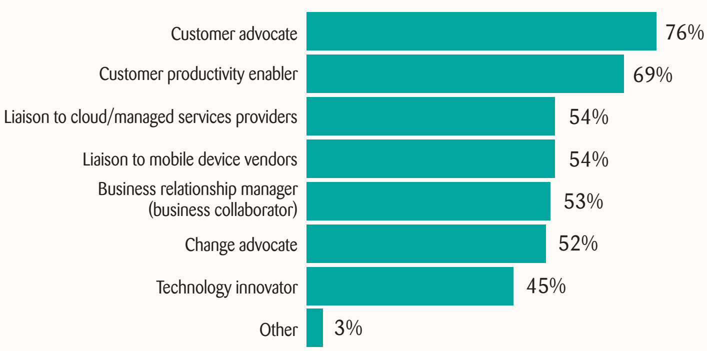
The Top Five Must-Have Characteristics of Technical Support Professionals




*Source: Robert Half Technology and HDI, The Technical Support Center of the Future (June 2013)*

demand for IT services professionals with strong interpersonal skills who can quickly learn how to assist users with a wide range of technologies and adapt to new ways of working."[2]

The Many Hats IT Support Professionals Will Wear in the Future



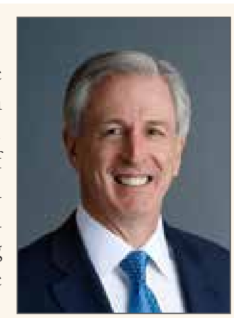

*Source: Robert Half Technology and HDI, The Technical Support Center of the Future (June 2013)*

## Steps to Evolve Your Help Desk into a Help Center of the Future

- Begin to redefine your support organization's mission and objectives to include these broader challenges and aspirations.
- Assess the current state of your support model and personnel.
- Outline the services you believe the business may need in the future, and gather direct input and feedback from your user community to validate.
- Collaborate with business users to get closer to the business and learn more about what business users really need (i.e., allow the support organization to be a true enabler for the business).
- Think in terms of providing more than just basic technical support, and, again, gather feedback from your user community on the types of support they would deem valuable.
- Identify third-party resources to fill long- and short-term gaps in your support offerings, and provide a source of flex-capacity. This will allow you to bring in additional services when needed, making the IT department much more agile and responsive.
- Stay educated. Services and device providers such as Microsoft, IBM, Deloitte, Dell, Cisco, and others offer various options for facilitating business-user envisioning sessions at state-of-the-art facilities.
- Organize sessions and pilots to allow support personnel and business-user groups to see new platforms, applications, devices, and operating systems. Let them see and talk about how they can use the new features, capabilities and tools.

This is an exciting time and inflection point in the evolution of the enterprise support organization—a time when visionary leaders can move to center stage and transform their support organizations into vital centers of critical support for the business. The organizations that successfully evolve their service models and offerings will have a dramatic impact on the businesses they support, and they'll establish themselves as invaluable service providers to the business.

### ABOUT THE AUTHOR



Brian Madocks is the CEO of PC Helps. He has more than twenty years of experience in the technology and business services industry. Prior to PC Helps, Brian was the CEO of SunGard Higher Education and an SVP and general manager at SAP America. He received his BS in finance and economics from Long Island University and completed the Executive Development Program at INSEAD in France.

[2] HDI and Robert Half Technology, *The Technical Support Center of the Future* (June 2013), **www.thinkhdi.com/Topics/Research/tech-support-center-future.aspx**.


# A Match Made in Heaven: Application Virtualization and the Service Desk

By Eveline Oehrlich and David K. Johnson

Is your company seeing the continual growth of application virtualization? According to our research, 49 percent of IT decision makers rank implementing and expanding the use of client virtualization, thin client, and application-streaming technologies as either a critical or major user-computing priority. The primary drivers are mobility, manageability, lowering costs, flexible remote access, disaster recovery, security, compliance, and better support for BYOD programs. Last year, many enterprise IT decision makers reported that they were planning to "implement" or "expand" their current implementation for each of the following technologies: VDI (28%), desktops-as-a-service (15%), and application virtualization (29%). These technologies and trends are poised to continue developing in 2014. Hopefully, your company has adopted application virtualization or is planning to grow its adoption. If so, that's great news for your service desk and desktop team.

As a quick refresher, application virtualization technology isolates applications from the underlying operating system and from other applications to ease compatibility and simplify management challenges. It enables applications to be streamed from a centralized location into an isolated environment on the target device, where they execute locally. The best usage scenario for this technology is that it simplifies the deployment and management of desktop applications to users with traditional PCs or laptops. The three leading application virtualization solutions are Citrix's XenApp, Microsoft's App-V, and VMware's ThinApp. Application virtualization often goes hand in hand with client virtualization, which encompasses technologies like thin clients, virtual desktop initiatives (VDI), and workspace virtualization. All of these are in a growth phase, but many organizations see application virtualization, specifically, as the future of software delivery for an increasingly diverse workforce.

So why is this important to the service desk or service support team? The adoption of application virtualization has several key benefits for your service desk:

- One of the most attractive benefits of application virtualization is that it lowers support costs. Let's think through this together: On-site visits greatly increase support costs. Forrester estimates that an on-site support visit can cost eight times as much as a phone-based support call. Application virtualization technologies make deskside visits a thing of the past because all of the computing is now happening in the data center. This means that IT staffers can fix desktop or application problems simply by logging into the server.
- Application virtualization isolates an application's resources, eliminating the risk of conflict with other applications. Supporting such applications becomes much easier as the support staff doesn't have to troubleshoot much on the PC and they leave no footprint—the application is streamed from a server.

- Bandwidth issues or performance issues can typically be managed more easily. If implemented correctly, application virtualization works well when there is acceptable bandwidth (for streaming) and a fixed number of known applications are in use.
- Application virtualization dramatically improves security, as this can be managed at the source rather than at the client level.
- Application virtualization can significantly reduce the costs of ongoing support and patch management.

What does this mean for your organization? If you're not yet involved in your company's decision-making process, then get up and move! In today's "age of the customer," your organization should be investing in business technologies that allow your company to become customer-obsessed, to drive growth and differentiate itself from its competition. To make this vision a reality, your organization must plan for and adopt new technologies that will have an impact on how users are supported and empowered to run their business processes and services. These issues are the cornerstone of differentiation.

Successful service desk teams should adopt, socialize, and leverage simplification and cost-reduction measures in their end-user support strategies. This will enable them to simultaneously accommodate the needs of their workforces and master freedom and security. These industry leaders will do so by adopting client virtualization, formalizing BYOD programs, and becoming brokers of cloud-based services. The result: less time wasted on the inefficiencies of legacy applications and circumventing IT's policies and controls.

## ABOUT THE AUTHOR

Eveline Oehrlich is a vice president and research director at Forrester Research, where she serves Infrastructure & Operations professionals. Her current research focuses on ITIL, the implementation of ITSM from a holistic or partial perspective, business service management, and many other aspects of IT operations. Eveline has more than twenty years of experience working with IT organizations in the definition and development of IT service delivery processes and the implementation of IT service management as a practice inside enterprise organizations.

David K. Johnson is a principal analyst at Forrester Research, where he serves Infrastructure & Operations professionals. He's an expert in client virtualization technologies, including VDI, terminal services, application virtualization, desktop and mobile OS platforms, and converged infrastructures for VDI and DaaS. David has one passion and one goal: helping companies create workforce computing experiences that engage people and enable them to do their best work.

# It's Not About the Channels in Your Support, It's About the Support in Those Channels

By Alan Berkson

There was a time when it was enough to have a toll-free phone number as a single channel for customer service. Those days are long gone. The world is multichannel, and organizations need to embrace multichannel support. In fact, the multichannel part is a given; let's just call it support.

But if that's all there was to it, this would be a very short article.

Today, organizations are facing a proliferation of communications channels, and this is changing the way they communicate within their organizations and, more importantly, with their customers. We're living in an era of what I call *pervasive communications*, where conversations are truly global, no longer constrained by national or natural borders. As I wrote back in 2011:

The challenge now is that pervasive communication has become chaotic—the sprawl of communication mediums offers competing, yet similar functions. Conversations now leap among platforms and channels with an unprecedented fluidity—a Twitter update engenders an SMS text which leads to a phone conversation that informs a blog post that points to a website viewed on a mobile device which generates a sale in a brick-and-mortar venue—yes, chaotic, hyperconnected, ubiquitous and nonlinear.[1]

There is constant innovation in communications and communications channels. We have traditional channels like phone, email, and fax, which are often implemented with on-premises, hardware-based technology. Then there are newer channels like websites, Twitter, and Facebook. And what about mobile? SMS? VoIP? Video conferencing? Chat? The list goes on and on, and it's growing rapidly.

As organizations, we have to think about multichannel as a strategy. Not so our customers. They live in a world of pervasive communications. They're inherently multichannel. They use the tools at hand with equal alacrity. The challenge with a multi-channel support strategy is not just covering your preferred channels, but covering the channels preferred by your customers.

While much of what I'll cover here can be applied to overall customer service within an organization, my intention is to help you leverage and enhance your customer service as you add channels to your multichannel support strategy. I will focus on two areas: a general cycle for support maturation that is applicable to new channels, and some advice and thoughts on how to be successful in approaching and adopting new support channels.

## The Great Pyramid of Support Maturity

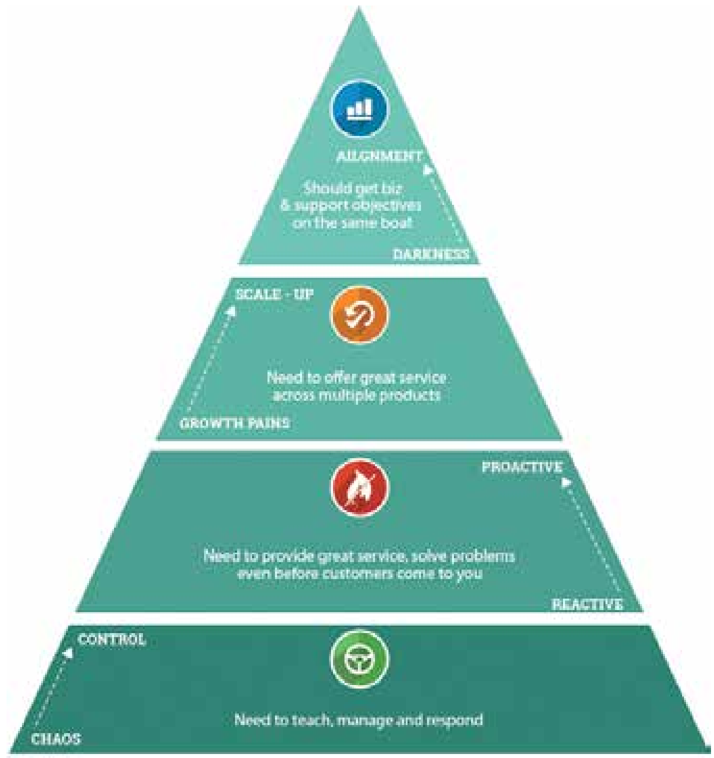
Getting a handle on support requires a macro and a micro strategy. Vikram Bhaskaran, director of marketing at Freshdesk, has built what he calls the Great Pyramid of Support, a hierarchy of how support evolves both within an organization and often within specific channels:

- **Chaos to control:** When you enter a new channel, it's usually chaos. There's a learning curve for communicating within a channel and delivering support. So very often the first activity is going from chaos to control: delivering a consistent and effective customer experience in the channel.

- **Reactive to proactive:** The newest channels for support have changed the paradigm. For a long time, customer support was a one-to-one interaction. With social media, conversations have moved from one-to-one—email, phone, chat—to many-to-many. On social media platforms like Twitter and Facebook, your customers are sharing their desires and problems with the world. Customer service is no longer about reacting, just waiting for the phone to ring. Your customers are taking to social, whether you want to be there or not.

[1] Alan Berkson, "Let's Call It What It Is: Pervasive Communication," Intelligent Catalyst (October 12, 2011), blog.intelligistgroup.com/lets-call-it-pervasive-communication.

The Great Pyramid of Support




*Source: Vikram Bhaskaran, Freshdesk*

- **Support to scale:** As you learn the rules and idiosyncrasies of a new channel, the next challenge is scale. You need to be able to extend the level of support you have on your best channels to the new channels. This often involves leveraging technology. The caveat is, the technologies you leverage need to enhance the experience, not put more layers between you and your customers.

- **Aligning support with the business:** Great customer service isn't just about making the customer happy; it's also about extending the value of the brand and creating brand advocates. Be sure to collect and develop analytics and establish a feedback loop in line with other support channels.

## One Community, Everywhere

Getting back to our central premise, it's not about the channels in your service, it's about the service in your channels. Customers want a unified experience everywhere they go (or, if not unified, at least satisfactory). The interaction customers have in a channel may be the first (and only) interaction they have with your organization. As you look to extend your support to new channels, here are some thoughts to keep in mind:

- **To be (there) or not to be (there):** So, what channels should you be on for support? The easy answer is, *Be where your customers are*. If only it were that simple.

Here's a question many support managers and leadership often ask: *Is it better to be in a channel and do it poorly, than to not be there at all?*

The bottom line? You can be sure that even if you aren't there, your competitors will be. Consider this: If you knew 80, 60, or even 20 percent of your customer base was gathering in Central Park to talk about you, what would you do? Ideally, you'd get yourself to the park as quickly as possible, even if it was just to hear what they were talking about.

- **No support is worse than bad support**: The response most businesses give when asked why they're not exploring newer channels is, *What if we do a bad job?* It's Ostrich Syndrome: when in doubt, hide your head in the sand, and hope the problem goes away. However, customers *have* moved on to these new channels, and they're not going away. So, by not getting there, you're actually just avoiding them.

  If you actually did do a terrible job, and you knew it, there's at least a chance of improvement. You could try and explain your position, and you might eventually get a few customers back on your side. But by just *not* going, you're missing out on even that opportunity.

- **Show them you care:** When it comes to support, the opposite of love isn't hate, it's indifference. Organizations are afraid of social media because they're scared they'll get caught in a flame war with dissatisfied customers. But when customers find themselves talking to a wall, they believe you just don't care.

  Multichannel customer experience can be the biggest opportunity or the greatest point of failure. You control the outcome, depending on how much effort you put into it. By not taking a multichannel approach, you're just closing out any possibility in that channel.

- **Mobile is the ultimate disruptor:** Mobile users have perhaps the greatest range of channels to choose from: voice, SMS, MMS, web, etc. And in developing countries, many (most?) people have a smartphone before they get any other computing/communications device. It's critical that businesses are able to connect with customers regardless of where they are or what device they're using.

- **Support in the cloud:** Today's businesses are pushing the envelope in communications technology, leveraging clouds and platforms to replace older hardware-based communications channels. Support organizations need to keep up with the pace. They can use the same cloud and platform technologies to not only connect with more customers but also provide a more unified experience.

- **Managing expectations:** With new channels, the temptation is to overdeliver. This is a great goal, but it's often not sustainable or scalable. While customers will always want as rapid resolution as possible, setting and meeting expectations in terms of response and resolution go a long way towards improving the overall customer experience.

While the advice here is pretty straightforward, most of the challenges support organizations encounter stem from inertia. Entrenched processes and legacy systems, often implemented at great cost, can hold back innovation in a support organization. Organizations need to make themselves as agile as their customers. Twilio CEO Jeff Lawson had this to say about the challenges facing support organizations and, in particular, contact centers as they embrace multichannel support:

> To keep pace, contact centers need to move away from their brittle hardware-centric infrastructures and into the cloud and make that new cloud-based infrastructure addressable via standard software interfaces. This shift from closet to cloud allows infinite flexibility and agility, and lets you to keep pace with the increasing change in the customer interface and employ a more holistic approach to communications. From email to text messaging, web apps to picture messages, etc.— **today's users don't see distinct communication channels, they simply see communication.** The number of communications channels will continue to increase and relying on a hardware vendor to keep up-to-date is a growing risk for these companies.

## It's Your Service, Whatever the Channel

Change is never easy, and one of the biggest challenges with multichannel support is simply the pace of change. It will require vision, creativity, and strong leadership to see it through. It will require some experimentation and failure. And it will require staying true to your customers in terms of who you are as an organization. After all, you're not changing your support culture, just extending it to new channels.

In the end, customer service is an aligned goal, for the customer and the organization. Any way you can increase the connection and decrease the friction in this interaction is a step in the right direction.


### ABOUT THE AUTHOR

Alan Berkson is the director of community outreach for Freshdesk, a software provider of hosted customer support solutions. Alan has deep experience in technology and customer service in the SMB marketplace, and he was recently named one of the "Most Social Customer Service Pros on Twitter" by *The Huffington Post*.

# O365 + 92% FCR = Supporting Office 365 at the University of New Mexico

By TJ Martinez and Andrea Rodgers

Microsoft Office 365 (O365) is a robust online system that, among other things, provides access to email and calendar services and gives end users the ability to synchronize data on their mobile devices. Supporting O365 is no easy task, especially in a university setting with a diverse audience of end users. But the University of New Mexico Information Technologies (UNM IT) is doing just that—and achieving exceptionally high first contact resolution rates, as well as huge growth in the use of our online knowledge base. How? By getting back to basics.

## Background

In January 2011, UNM IT, in collaboration with the UNM community, made the decision to move from Communigate, a simple web-based email system, to O365. We decided to perform the email migration in phases, instead of using a "big bang" approach to migrate everyone all at once. The first phase of the O365 migration focused on the calendar, email, and mobile-device synchronization components, and was only for faculty, students, and retirees. The staff transition was scheduled for a future phase.

This initiative marked a significant expansion of the university's communication service, and getting the service desk team involved early on proved to one of the keys to the success of the transition.

## Testing and Development

The first step in developing a support model for O365, which was branded Lobomail, after UNM's mascot, was to obtain test accounts for the service desk agents. The technical lead provided us with twenty accounts to start the early testing and initial knowledge development. Approximately one month prior to go-live, the agents' production email accounts were migrated to the new system for alpha testing. This testing period ensured that the service desk agents were completely immersed in LoboMail, which increased their expertise in the new system and ensured thorough knowledge testing and development.

Two weeks later, we began beta testing. A group of end users volunteered to pilot the new LoboMail system. Their existing accounts were migrated to LoboMail and they were able to pilot all aspects of the new system, including support and knowledge articles.

## Knowledge Creation and Development

The first step in creating new knowledge articles for LoboMail began with a review of the existing articles for the old email system. Using our own experience with the system and support expertise, as well as knowledge metrics like number of hits and user rating, we reviewed the content and identified knowledge articles that we felt could be carried over to the new system.

Once specific FAQs were identified, the service desk took a first pass at developing the answer content. We used our ITSM tool to route articles to technical subject matter experts (SMEs) for content review and approval; the SMEs then routed the articles back to the service desk for publishing in the knowledge base. Using this process, we were able to publish 66 percent of our knowledge prior to the start of alpha testing.

During alpha-testing phase, agents actively engaged knowledge management—using, flagging, fixing, and adding content (UFFA)—and identified the key triage documentation the service desk would reference when supporting end users. Our beta and pilot testers completed the same UFFA exercise, and as a result, 90 percent of knowledge articles (out of ninety-five, total) were published before go-live.

One thing that was particularly critical to our long-term success was avoiding duplication. We made temporary information regarding the LoboMail project available at the project website, **lobomailinfo.unm.edu**. Any information that was required after go-live would be published in the enterprise knowledge base, ensuring that content could be kept on a review cycle and made available to users long after the project was complete. Other published information, like marketing ads, referred end users to the knowledge base and project site.

## Defining Support Boundaries

One of the most important, exciting, and challenging opportunities was setting and communicating realistic and sustainable customer expectations around support. We didn't have the resources or environment to successfully support *all* of the features of LoboMail. In order to provide excellent customer service, we had to focus on supporting only basic functionality. The key to our success in this was effective communication; we clearly documented our support boundaries in the knowledge base, and referred end users to the UNM Business Policy as appropriate.

One of the boundaries we set related to forwarding email out of LoboMail to a third-party email provider. The knowledge article states:

The University of New Mexico does not support students forwarding their email outside LoboMail. UNM Business Policy 2540 states: "Students who choose to have their email forwarded to a private (unofficial) email address outside the official University net ID/email address (@unm.edu) do so at their own risk. The University is not responsible for any difficulties that may occur with privacy or security, in the proper or timely transmission, or in accessing email forwarded to any unofficial email address."

LoboMail does not prevent students from setting up a rule forwarding UNM email to an external email system. However, in alignment with UNM Business Policy 2540, UNM IT does not offer customer support for this functionality.

We also set boundaries around connecting to LoboMail from a client and/or mobile device. We clearly stated that we would only provide support for Outlook clients and for mobile connections made using ActiveSync. While some end users weren't happy, they understood and respected the boundaries, which have enabled us to provide an optimal level of support.

## Defining the Support Process

Another important task was defining the support process. Our process entailed searching the knowledge base and project site, logging all issues and questions in the ITSM tool, engaging in UFFA to create and refine our knowledge articles, and setting realistic customer expectations with regard to our support boundaries. This was obviously important for the service desk, but it was also important for the other IT staff who were supporting end users in the new system. We knew that all IT staff would be asked about LoboMail, whether or not they worked on the service desk, and it was important that every one of them followed the same process to ensure a consistent experience.

Something new that we tried for the first time was the creation of a tier 2 support team inside the service desk. This tier 2 role is a high-level student staff position, and it's been critical in helping us improve our knowledge and achieve our high FCR rate.

support, resolved 92 percent at the service desk, and saw 34,222 hits on LoboMail knowledge articles.

More importantly, we delivered real value to both our end users and the technical team. Our end users experienced faster and more accurate resolutions, increased support availability (with knowledge articles available 24×7), and new features and functionality that were fully and consistently supported by the service desk. The technical teams benefitted from having to dedicate fewer technical resources to support activities (especially repetitive questions or issues), being interrupted less frequently, and being able to identify trends and issues earlier. As just one example, the service desk was able to provide feedback and metrics that justified an emergency change to the login process, which the technical team was able to execute because they weren't being pulled away by end-user support requests.

## Lessons Learned

Our implementation was a great success, and we learned some valuable lessons for future implementations:

- A true pilot includes knowledge *and* support.
- Define and communicate service and end-user requirements first. These requirements will inform your support boundaries and the associated knowledge.
- Define support levels and map service functionality, support boundaries, and end-user requirements to support levels.
- Make sure you have technical resources (SMEs) available for knowledge review, feedback, and creation.
- Get the desktop support team involved before go-live and after, as a tier 3 support provider.
- Get the service desk involved early, before other test groups.

There was no "silver bullet" that made our Office 365 migration a success. It was just good old-fashioned support processes and tools that have been around for a long time. This project gave us the opportunity to take those tools down off the shelf, polish them up, and sharpen them for a modern-day support model.

## Communications

The final piece of preparation before go-live involved developing user communications. To ensure consistency and help us maintain our customer focus in user communications, customer support approval was required on all communications. We established the following guiding principles:

- Keep it as short as possible, and include only information relevant to the customer group you're targeting. Remember, it's not about what IT wants to communicate; it's about what customers want and need to know.
- Put the most important information at the top. Most customers won't scroll down to read the entire email.
- Provide links to additional information, but only link to official and secure sites.
- Refer customers to established support channels and knowledge sources.
- Use bullet points and white space to bring attention to key items.

## Go-Live

Go-live began two weeks before the start of the semester, and we used a phased rollout to avoid high-volume business cycles, level out the support load, and ensure that we had sufficient resources available to meet customer demands. We migrated approximately 10,000 students each day (≈ 39,000 total), and we made the migrations in the early morning so that customer support would be open and available by the beginning of the school day.

During the first week of go-live, the service desk received 531 requests for LoboMail support, with an FCR of 89 percent. There were 18,139 hits on LoboMail knowledge articles. In the first four weeks, the service desk received 1,135 requests for LoboMail


### ABOUT THE AUTHORS

Tammy Jo (TJ) Martinez is currently the director of customer support at the University of New Mexico, where she's committed to showing the value of the service desk as the face of IT. TJ serves as the executive sponsor of the UNM IT Agreements Committee and has led the group to creating several campus-wide service level agreements. TJ also directs the Workstation Management team at UNM IT and has successfully stood up a Managed Workstation fee for service.

Andrea Rodgers is the service desk and incident manager for the University of New Mexico. She has more than nine years of practical experience in service desk management, knowledge management, leadership, customer service, and ITIL. Andrea has been an HDI member since 2005, and her passion for continuous self-improvement has led her to earn an MBA and several ITIL Intermediate certifications.

# TECH TRENDS: Disk Imaging

By Roy Atkinson

First, let's define *disk imaging*. Disk imaging produces a sector-by-sector copy of the original disk, keeping all the data intact. Backups often concentrate solely on user data and, therefore, don't capture all the information that exists on the original disk.

## Why Image?

There are many reasons to image hard disk drives—surely as many reasons as there are organizations—but probably the most common one is to capture the data and configuration information from a computer as part of the process of hardware replacement. I could, for example, take an image of your current, aging laptop (which has been painfully upgraded to Windows 7), and put that image onto the drive of your spiffy new laptop. If all goes according to plan, your new laptop will function just the same way as your old one (only much faster, one hopes), with all of your shortcuts, dictionary entries, and half-completed projects intact.

Another reason would be to create a custom configuration for a group of computers, including all of the applications needed for a specific task, or for a specific department. We could, for example, create an image of a "sales department" computer with browser home pages set to Salesforce.com's login page, or "finance department" machines homed on the company's Oracle login, with all the data analysis tools already enabled in the new installation of Excel.

But there's another reason we don't like to talk about, and that is forensic analysis. Unfortunately, it sometimes becomes necessary to do a thorough examination of all the data on an individual's hard drive, whether we're engaged in a legal action or searching for evidence of a breach of company policy. In such cases, the forensic investigator, whether a law enforcement officer or a desktop support manager, should *never work on the original evidence.*[1]

Removable media, such as flash drives and SD cards, or optical media, such as CDs and DVDs, can be imaged as well, and moved to either physical or virtual disks. This can allow for easier backup and deployment of the contents of the disks. It's also possible to image optical disks to USB flash or SD media for easier distribution and use. As part of your department's marketing initiatives, for example, you may wish to distribute a video and some self-service information on flash drives. You could set up one drive just as you want it, and then copy that image to the drives you'll be giving away.

## Finding the Right Tool

There is a variety of disk imaging software available for enterprises, for small businesses, and for personal use. Their capabilities may vary, but they all share the ability to make sector-by-sector copies of existing data. Use the HDI Buyer's Guide as the starting point for your disk imaging tool search.

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[1] Madihah Mohd, "Section 5.1: An Overview of Disk Imaging Tool in Computer Forensics," SANS Institute (2001), www.sans.org/reading-room/whitepapers/incident/overview-disk-imaging-tool-computer-forensics-643.

# Anyone Can Be a Leader: Tips for Today's Support Managers

By Gina Montague

Listen to what's being said (and not said).

Be passionate!

Lead by example.

Empower others to master their skills and take advantage of opportunities.

Know your gaps!

Hire for personality and drive; the rest will come with time.

Ten years ago, on a recommendation from my manager, I attended my first HDI conference. At the time, I'd been a support manager for about three years, and I'd been attending HDI local chapter meetings sporadically. I knew about HDI, but the conference was a revelation. HDI's conferences bring together an enormous group of support professionals to spend three days learning and networking. I left that first HDI conference with pages full of notes, in high spirits, and full of excitement to get back to work and implement all the lessons I'd learned.

As I was preparing to present at this year's HDI annual conference (for the first time!), it hit me: it was the first HDI conference I attended all those years ago that really ignited my love for support. I just can't get enough of it. I love reading about support, attending local chapter meetings, annual conferences, and training events to learn more about support, and networking with others to share what I've learned.

I've been an HDI local chapter officer in the Minnesota chapter for more than eight years, and as an officer, I've had the opportunity to network with individuals around the world. One of the most important lessons I've learned is that when you love what you do, who you do it with, and the company you work for, great things happen. In researching great companies and great teams, I've found that there are three key components that positively affect and promote the health of an organization: leadership, culture, and people. These three areas can make or break a team or an organization. Here are just a few of my favorite lessons learned.

## Leadership

Leaders don't have to be managers, but managers must be leaders. Successful leaders tend to have certain qualities:

- **Humility**: Leaders carry themselves with a quiet confidence and let their character speak for itself.
- **Influence**: Leaders bring value by motivating, identifying, forecasting, and recommending solutions to problems.
- **Self-awareness**: Leaders have the ability to recognize and understand their moods, emotions, drives, as well as their effect on other people.
- **Listening skills**: Leaders make a deep commitment to listening intently. They listen to what is being said (and not said), and the make sure the other person feels heard, which is more than just listening.
- **Passion**: Passion is a great motivator, and a leader's excitement and enthusiasm can inspire the same in others. Leaders don't have be constantly cheerful, but when they believe in what they're doing and what the company is doing, that energy comes through in their actions.
- **Leading by example**: The best leaders are those who lead by example, pitching in where needed and lending a helping hand, and who are both team leaders *and* team followers.
- **Delegate**: An effective leader delegates responsibility to team members, facilitating and motivating them to be successful.
- **Commitment**: Leaders take ownership of issues and collaborate with other team members. They seize the initiative and welcome responsibility.
- **Teamwork:** Leaders focus on what's best for the team. They create and maintain a positive, efficient, and safe work environment. Leaders have the ability to find common ground and build rapport.
- **Mentor and motivate**: Leaders inspire and influence others to achieve results in a high-interrupt environment. They are passionate about their work, for reasons that go beyond money or status.
- **Drive change:** Leaders embrace change enthusiastically. More importantly, they encourage and drive it, focusing on continual improvement.
- **Read:** Leaders read at least one leadership book every quarter, and they share what they've learned either by creating an informal book club or by creating a support library. This allows them to open up dialogues with others who've read the same books.
- **Initiative:** Leaders don't wait to be asked. Volunteer for a committee at work or in your community. There are more than sixty HDI local chapters in the United States and Canada, and they're always looking for leaders to stand up and lend a hand. Volunteer to be a local chapter officer!

## Culture

Your core values define your support strategy and are the foundation of your culture. They tell people who you are, what you do, and why you do it. And where attention goes, culture grows. The key to building a strong culture with engaged employees is to create opportunities for people to be autonomous, to master their skills, and to understand their purpose. To cultivate your culture:

- Tell your customers about your culture on your website.
- Showcase your logo/motto/values on everything: the back of business cards, name badges, team t-shirts, gift cards, etc.
- Create an annual photo book (yearbook) for the team. Have everyone sign it.

- Take a team picture for your customer holiday cards.
- Have the team paint a picture together, and then hang their masterpiece in the office.

## People

Having the right people on your team is crucial. You can teach people the technical parts of the job, but you can't teach people how to be customer-friendly. We all know what excellent customer service is, and for the most part it's common sense. Most people have common sense, but not everyone has *service sense*. Sound *service sense* is more important than knowledge, though knowledge enhances it. Sound *service sense* is a quality that cannot be defined, yet it's invaluable when present and noticeable when absent.

People with a *service sense* love to help, they know just what to say to make a situation better, and they will go out of their way to do the right thing. These are the people you want on your team. Hire for personality and drive—for *service sense*.



- **Recruitment:** Do you know which skills and abilities are essential to making your team the best it can be? Having a team with diverse skills is important. Some people have excellent communication skills, while others are able to solve complex issues quickly. If everyone on your team has excellent problem-solving skills but they all lack soft skills, your customer experience will suffer. Know your gaps! Identify your team's strengths so you know which skills are must-haves, whether you're recruiting new team members or supporting current team members in their professional development.
- **Ask situational and behavioral questions:** When interviewing, be sure to ask both situational (future; "What would you do…?") and behavioral (past; "Tell us about what you did when…") questions.
- **Make it a good fit—for everyone:** Onboarding is costly, which is why it's crucial that the person you hire is the right fit for a given position. For example, if the prospective hire will be talking to customers over the phone, do a phone interview. Also, include your team on the interview process, and take him or her on a tour of the office. Remember, while you're evaluating the interview as a potential employee, the interviewee should also be evaluating the company to make sure they understand the company's mission and culture.
- **Onboarding new employees:** Create a warm welcome! You won't get a second chance to make a good first impression. Have a welcome note from the team waiting for them on their first day, along with a piece of their favorite candy (this can be a fun interview question). Ask them what you can do to improve the onboarding process and make it better for the next new hire.

Everyone can have a great culture, a great team, and a great organization. All it takes is leadership and teamwork.

What are some of your favorite lessons learned? Tell us at **www.HDIConnect.com**!

### ABOUT THE AUTHOR

Gina Montague is the support services manager for Infinite Campus, a student information system (SIS) for K–12 education. Gina has been in the support industry for more than fifteen years and she is passionate about delivering positive customer experiences. She has been a support manager since 2001, which is also when she became an HDI member. Gina is currently the president of the Minnesota local chapter, where she has served in various officer positions since 2005.

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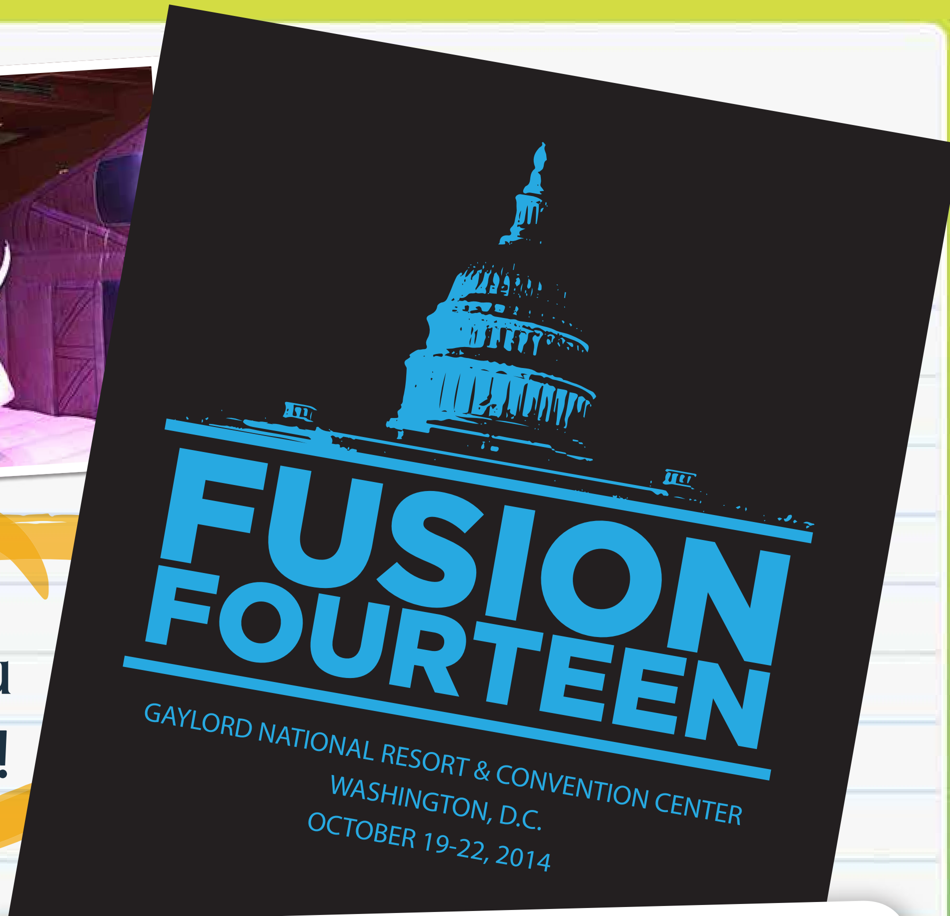


See you next year!

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**Third Place:**

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**Honorable Mention:**

University of Pittsburgh

### LIFETIME ACHIEVEMENT AWARD

Suzanne Van Hove

### PROJECT OF THE YEAR

ASSURANT

### LIG/SIG EXCELLENCE AWARD

Dallas/Ft. Worth

### WHITE PAPER CHALLENGE

Mitesh Desai and Aniruddha Deshpande
"Controlling Cloud Sprawl Using Effective Governance"

### PRESIDENT'S AWARD

Cathy Kirsch

### MEMBER OF THE YEAR

Jeanette McGillicuddy

For more information about the student case competition and itSMF USA's award program, visit **www.itSMFUSA.org**.

# Community NEWS

## Announcing the 2014 HDI Editorial Board

Two years ago, we launched the first HDI Editorial Board, a group of practitioners and thought leaders from the member community and the industry at large. We charged the board with providing guidance, advice, and input on hot topics and current issues in the technical service and support industry, which we then use to develop fresh content not only for each issue of *SupportWorld* but also for the blogs, webcasts, white papers, and newsletters you'll find throughout **www.ThinkHDI.com**.

You'll see the first fruits of the 2014 HDI Editorial Board's labors in the January/February issue. And, as always, if you have any recommendations, ideas, or feedback, please send them to **editor@ThinkHDI.com**.

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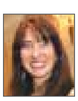
## *Meet the Board Members*



**Anna Frazzetto** is the SVP and managing director of International Technology Solutions for Harvey Nash USA. She began her career in IT as a systems engineer with IBM, later moving to Syncsort, MHT Software, Comdisco Computing Services, where she developed and implemented a remote computing service and a help desk, and Spherion, where she was a key driver in the expansion of its managed service line of business. In addition to being a member of the HDI Editorial Board, Anna is a member of the HDI Strategic Advisory Board and the HDI Support Center Leadership Certification Standards Committee.

**Aran McFarland** is currently the director of Rehab Systems – Customer Service at Genesis HealthCare, one of the nation's largest skilled-nursing and rehabilitation therapy providers. Aran has held a number of help desk and support leadership positions over the past fifteen years, and he is dedicated to advancing the role of the service desk of the future.

**Barbara Hswe** is the VP of the enterprise support group at Teach for America. In more than seven years with Teach for America, Barbara has managed the support organization's evolution from separate infrastructure and support teams to a unified user support team that supports devices, applications, and telecommunication systems. Before coming to Teach for America, Barbara held systems administrator, support engineer, and support analyst positions at a bio-technology firm, a foster care foundation, and a financial software firm.

**Ben Compton** has more than twenty years of experience in IT. At Tampa Electric Company, he is currently responsible for creating a work culture that is engaging, promotes individual and team growth, and measurably improves the quality of IT support services. Ben is a popular speaker and group facilitator, focusing on leadership, culture, and performance assessment. He has also spoken at conferences, corporate events, and HDI local chapter meetings.

**Brian Fodrey** is currently the director of technology services for the School of Education at the University of North Carolina at Chapel Hill. He has more than ten years of experience working in higher education, and his professional interests include using technology to support administrative and academic effectiveness in higher education. Brian received his MS in adult learning and organizational performance from Drake University and his MEd in instructional technology from Kent State University.

**David Disney** has more than thirty years of experience in technical service and support. He's currently the director of help desk operations for the University System of Georgia's Information Technology Services division. His help desk provides central, frontline support for enterprise business and education applications and technical services using a multi-channel SPOC support model, and he's excited about the future of service management and the support center as a strategic asset.

**David O'Brien** has more than twenty years of experience in the IT industry. He is currently the director of enterprise technology at KARL STORZ Endoskope, where he has overseen the centralization of the support model, which has improved overall efficiency and changed the way customers and the business view IT. Before joining KARL STORZ, David managed technical operations for an AOL partner and was the VP of information enterprise services at Deutsche Bank. He has participated in *CIO Magazine*'s Pathways leadership program, and he earned his MBA from Pace University in 2012.

**Ed Kroschinski** has been providing services to customers for the better part of thirty-five years, the last fifteen focused specifically on service desks. He has grown and managed service desk for three major outsourcing companies, as well as for midsize and large international organizations. Ed is currently the VP/global head of the service desk for AIG in Fort Worth, TX, and his passion for the users he supports is surpassed only by the value he places on the people that provide that support.

**George Louris** is a results-driven executive with more than twenty years of experience envisioning and leading IT support initiatives grounded solidly on business and economic value. A former engineer, help desk manager, and service delivery manager, George is currently the director of support services for Custom Computer Specialists, where he leads a passionate, enthusiastic customer-focused team that sees customer service as a key driver of success. In addition to sitting on the HDI Editorial Board, George is a member of the HDI Desktop Support Advisory Board and president of the Long Island HDI local chapter.

**Jim Tate** has more than fifteen years of experience in the support industry, with a focus on customer service. In his current role as the director of client solutions for PC Helps, Jim is responsible for coordinating efforts across all PC Helps departments in order to match service delivery with clients' varied needs and expectations. His objective is to ensure the operations team is equipped and ready to deliver outstanding support to customers. Jim received his BS (*magna cum laude*) in information systems and computer science from Villanova University.

**Kristy Trice** is currently an IS business relationship manager working with Fulfillment and Manufacturing at L.L.Bean, where she oversees a team that provides application and systems support for all fulfillment operations systems. Before becoming a BSM, Kristy was the manager of end-user computing at L.L.Bean, the senior manager of help desk, procurement, and change management at Warner Music Group, and a desktop support technician and project manager at the BP Amoco Research Center. In addition to being the president of the HDI vChapter, Kristy is a certified PMP. She received her MBA from Pepperdine University and her BS in computer science from Bryant University.

**Ron Sharkey** is a senior director at McKesson Corporation, where he's responsible for the organization's end-user support services, which includes two service desk teams, two deskside support teams, and an executive concierge services team. Before joining McKesson, Ron worked for an accounting software company in Michigan and provided end-user application support as well as training/consulting for proprietary applications.

**Ron Willbanks** is the director of enterprise business services at Whataburger Restaurants. Since joining Whataburger in 2008, he has held several leadership roles in restaurant services, governance, project management, business enablement, and infrastructure and application development. Ron has extensive experience in service management, project management, process improvement, service delivery, and customer care, and he's been recognized for his success in developing systems, processes, and procedures to streamline operations, increase revenues, reduce costs, and create competitive advantage. Ron received his MBA from Oakland University and is a certified PMP and HDI Support Center Director.

**Valerie Hall** is the assistant director for the service center at Orange County Public Schools. In this position, she leads service and technical training efforts for the school district. Before coming to OCPS, Valerie managed training and quality assurance for an IT development company and was the main support professional for a health insurance provider's implementation of the national Medicare claims processing system. She has presented at conferences around the world, and she was part of a team that was by SAP for its accomplishments in change control.

## Reflections on HDI Northern New England's CxO Forum

What do you get when you bring four C-level executives together in scenic Portsmouth, NH, and pose pressing IT questions? You get an entertaining and extremely informative look at the issues today's CxOs are faced with on a daily basis. HDI's Northern New England chapter put this event together and marketed it to IT professionals as "everything you want to know but were afraid to ask." It gave participants the opportunity to educate themselves in a relaxed environment, not only listening to what the executives on the panel had to say but also asking questions and sharing their own experiences.

The event was sponsored by Cherwell Software, with Internet provided by Sprint. The moderator was Deirdre Rogusky, the chapter's VP of content, and the panelists were Dan Kaplan, CIO, New Hampshire Local Government Center; Brock Kuhse, COO, Mainstay Technologies; Jeff Pollock, CIO, Wentworth-Douglass Hospital; and Andrew Richards, CEO, Techlok. The panelists shared both common and unique concerns from their respective industries, with topics ranging from BYOD, security, and mobility to projects in the pipeline, which kept people engaged both during and after the forum.

You can tell how a successful event is by how quickly people leave the room; at this event, attendees continued to discuss the topics long after the microphones were turned off!

—Margie Meyers

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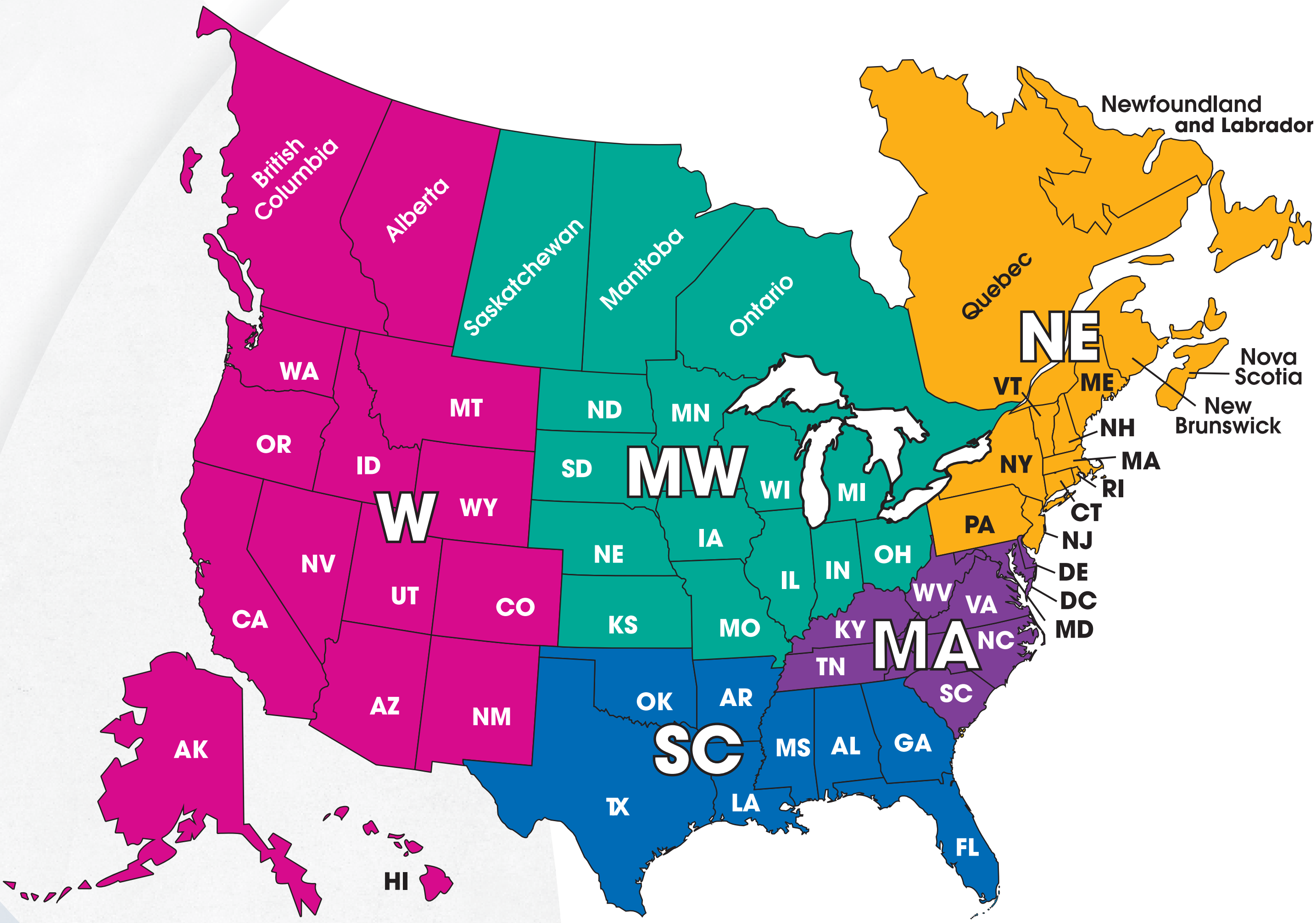


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You can also reach the HDI Customer Care Center at

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# HDI Certification and Training
# COURSE SCHEDULE

Schedule is subject to change. Check www.ThinkHDI.com/Train2014 for updates.

| COURSE | Public Classroom (Member Price/Price) | Virtual Classroom (Member Price/Price) | Online (Member Price/Price) | January | February | March |
|---|---|---|---|---|---|---|
| **PROFESSIONAL CERTIFICATION COURSES** | | | | | | |
| HDI Customer Service Representative | $795 / $895 | $795 / $895 | $345 / $395 | — | — | 18 Virtual Classroom |
| HDI Support Center Analyst | $1,395 / $1,495 | $1,395 / $1,495 | $645 / $695 | 13 - 14 New York City<br>13 - 14 Dallas<br>22 - 23 Toronto<br>24 - Feb. 7 Blended Learning<br>27 - 28 Minneapolis<br>27 - 28 Los Angeles | 3 - 4 Chicago<br>10 - 11 Washington, DC<br>11 - 12 Virtual Classroom<br>12 - 13 Calgary | 3 - 4 Boston<br>3 - 4 Ottawa<br>10 - 11 Atlanta<br>10 - 11 San Francisco<br>17 - 18 Harrisburg<br>20 - 21 Sacramento<br>27 - 28 Phoenix |
| HDI Desktop Support Technician | $1,395 / $1,495 | $1,395 / $1,495 | $645 / $695 | — | — | 3 - 4 Chicago<br>13 - 14 Ottawa<br>24 - 25 Washington, DC |
| HDI Support Center Team Lead | $1,595 / $1,695 | — | $745 / $795 | 20 - 21 Toronto<br>24 - Feb. 7 Blended Learning<br>27 - 28 Cleveland | 10 - 11 Calgary | 3 - 4 Washington, DC<br>5 - 6 Ottawa<br>17 - 18 New York City<br>24 - 25 Chicago<br>31 - Apr. 1 Orlando |
| HDI Support Center Manager | $1,895 / $1,995 | $1,895 / $1,995 | — | 14 - 16 Virtual Classroom<br>29 - 31 New York City | 5 - 7 Chicago<br>5 - 7 Calgary<br>12 - 14 Washington, DC<br>19 - 21 Atlanta<br>26 - 28 Los Angeles | 5 - 7 Boston<br>10 - 12 Ottawa<br>12 - 14 San Francisco<br>12 - 14 Virtual Classroom<br>17 - 19 Sacramento<br>24 - 26 Phoenix<br>30 - Apr. 1 Orlando |
| HDI Desktop Support Manager | $1,895 / $1,995 | — | — | — | 26 - 28 Washington, DC | 5 - 7 Chicago<br>30 - Apr. 1 Orlando |
| HDI Support Center Director | $2,795 / $2,895 | — | — | — | — | 30 - Apr. 1 Orlando |
| HDI Certified Instructor | $2,495 | $2,495 | — | — | — | 12 - 14 Colorado Springs |
| HDI Problem Management Professional | $1,595 / $1,695 | — | — | — | — | 31 - Apr. 1 Orlando |
| Knowledge-Centered Support Fundamentals | $695 / $795 | $695 / $795 | $395 / $445 | — | — | 4 - 6 Virtual Classroom |
| Knowledge Management Foundations: KCS Principles | $1,595 / $1,695 | — | — | 15 - 17 Edmonton<br>29 - 31 Toronto | 5 - 7 Washington, DC | 5 - 7 Atlanta<br>17 - 19 Ottawa<br>30 - Apr. 1 Orlando |
| ITIL Foundation | $1,395 / $1,495 | — | $99 / $149 | — | — | — |
| **PROFESSIONAL DEVELOPMENT COURSES** | | | | | | |
| Building Your Service Catalog | $645 / $695 | $645 / $695 | — | 28 - 30 Virtual Classroom | — | |
| Coaching Skills for Quality Support | $1,395 / $1,495 | — | — | — | — | 17 - 18 Chicago |
| Structured Problem Solving for the Support Professional | $1,395 / $1,495 | — | — | — | 24 - 25 Denver | 10 - 11 Washington, DC |
| Support Center Metrics and Measurements | $645 / $695 | $645 / $695 | $295 / $345 | — | — | 4 - 6 Virtual Classroom |

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