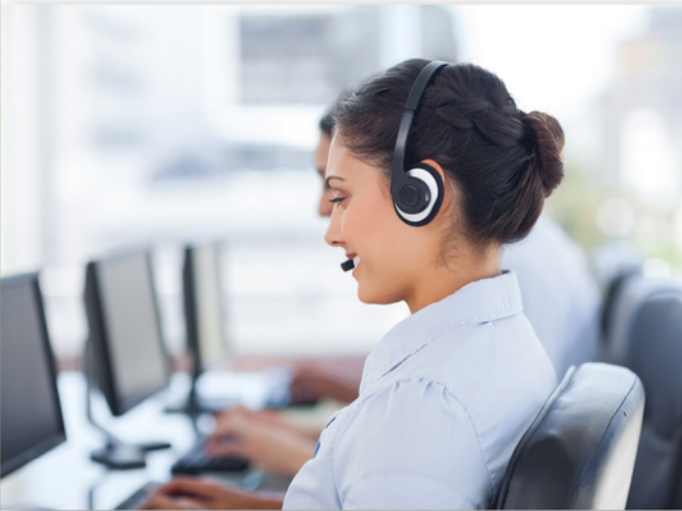


Customer Service Skills for the Service Desk Professional

Fourth Edition

Donna Knapp



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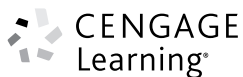
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FOURTH EDITION

A GUIDE TO CUSTOMER SERVICE SKILLS FOR THE SERVICE DESK PROFESSIONAL

DONNA KNAPP



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**A Guide to Customer Service Skills
for the Service Desk Professional,
Fourth Edition**
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Preface

It has been close to 15 years since the first edition of this text was published as *A Guide to Customer Service Skills for Help Desk Professionals*. In some respects, little has changed since that first edition. The function we now call the service desk is still first and foremost a customer service organization. What has changed, and what continues to change, are the customers themselves. Today's technology users are increasingly technically savvy and self-sufficient. They expect technology to work, and they expect easy access to a wide range of support services when it does not. They expect options! Businesses expect the service desk to offer these options and also to help people use technology to be more productive in the workplace, not just reactively fix technology when it does not work. They expect the service desk to proactively anticipate customer needs, and they expect the people working in the service desk to meet those needs in the most innovative, cost-effective ways possible.

The technologies used by service desks have also changed considerably since this book was first published. Service desk web sites and self-help services are now commonplace. Technologies such as incident management systems, knowledge management systems, and remote control systems have found their way into even the smallest service desks. Technologies such as instant messaging, chat, and social media have become viable tools in the battle to deliver services more efficiently and effectively. All of these changes have prompted service desks to rethink how they deliver support, the skills of their analysts, and, most importantly, how they interact with their customers.

What has not changed is the fact that customer service is fundamentally about people, not technology. It is about customers and their expectations, and it is about front-line service providers and their desire and ability to meet and exceed those expectations. Great service providers understand this and are working hard to continuously improve their skills and the quality of their service. They are also working hard to ensure that the technologies that are now readily available facilitate great service, rather than getting in the way of it. This book is dedicated to helping you do both.

For more than 30 years I have worked in the Information Technology industry. More than 20 of those years have been devoted to providing service desk–related consulting and training services. I understand how difficult it can be for an individual and for an organization to deliver high-quality technical customer support. I understand that customers can be demanding and company policies sometimes make it difficult to satisfy customers. I understand that technologies that are meant to help can quickly become a hindrance. I also understand that service providers are often asked to support complex technologies with inadequate training, tools, and information. This book is designed to provide the skills and insight you need to enjoy and excel in the challenging and dynamic environment that a service

desk offers. In addition, the business, soft, and self-management skills described in this book are excellent life skills that will serve you well regardless of your chosen profession.

Intended Audience

This book is intended primarily for three kinds of readers.

- Readers who are taking a course in service desks and technical customer support or a related degree program. They can use this book to obtain additional knowledge and depth about the ins and outs of providing quality customer support, as well as clear definitions and explanations of key concepts. They can use this book to learn about ITIL® and its guidance and best practices relative to the service desk role. (ITIL® is a registered trademark of AXELOS Limited.) They can also use this book to learn business concepts and techniques that are increasingly relevant to technical professionals. These readers will especially benefit from the end-of-chapter activities that provide practical experience with the concepts and skills they will use on the job.
- Readers who are considering career opportunities at a service desk, and who want to understand how to provide high-quality technical customer support in any situation. They can use this book to develop the skills needed to interact effectively and appropriately with customers, coworkers, and managers, whether face-to-face, on the telephone, via web-based technologies, or in written documents.
- Readers who are working in a service desk and want a better understanding of how to communicate effectively, handle difficult customer situations, solve and prevent incidents and problems, be a team player, and minimize stress. They can use this book to learn proven techniques for meeting and exceeding customer expectations, using data and information to improve individual and service desk team performance, and maintaining a positive attitude and sense of well-being while providing support.

Service Desk Curriculum

This book is designed for a customer service course in any Service Desk Curriculum. It is intended for use in community and technical college courses, such as Customer Service Skills, Customer Service and the Service Desk, and Problem Solving for the Service Desk. These courses are part of rapidly emerging programs in schools that aim to prepare students for the following degrees or certificates: IT Support Professional; Computer Service Desk Specialist; Computer Technical Support; Service Desk Support Specialist; Computer User Support; and Computer Support Technician. As the need for service desks grows, companies are turning to community and technical colleges to prepare their graduates to fill existing positions in the technical support industry.

No longer are technical skills the only requirement for the field of technical support. Companies now want to attract individuals who have the appropriate balance of business, technical, soft, and self-management skills that contribute to making their service desks successful. Increasingly, organizations that are committed to providing high-quality technical customer support view their service desks as a strategic asset. Whether the service desk

provides support to the customers who use their companies' products or the service desk provides technical support to the companies' employees, the need for qualified service desk professionals is on the rise.

Approach

This text is designed to provide an in-depth look at the business skills, soft skills, and self-management skills people need to provide effective customer service and support in a technical environment. The first chapter is devoted to a discussion about the evolving role of the service desk, trends influencing the service desk, and the dynamic nature of customer expectations. Chapters 2 through 6 explore in detail the soft skills needed for a successful career in customer support. The goal was to provide readers with proven techniques they could implement immediately. These techniques are introduced in chapters dedicated to subjects such as listening and communicating, handling telephone calls, technical writing, handling difficult customer situations, and solving and preventing incidents and problems. Chapter 7 explores the basic business skills commonly needed for analysts as well as the more advanced skills used by senior technical professionals, team leaders, supervisors, and managers. Chapters 8 and 9 are devoted to self-management skills, including being part of a team, minimizing stress, avoiding burnout, and effectively managing time.

Although this book is very how-to oriented, it describes the bigger picture benefits of acquiring and demonstrating business skills, soft skills, and self-management skills. For example, this book will help readers understand that business skills enable them to understand the goals of the company where they work (or where they want to work) and how they can contribute to those goals. This book will also help readers understand that soft and self-management skills will enable them not only to find a good job and achieve success in the technical customer support industry, but also to feel considerable job satisfaction while avoiding the frustration and burnout that is inherent in that industry.

To derive maximum benefit from this book, readers must be an active participant in the learning process. The end-of-chapter activities are specifically designed to develop their knowledge and help them assimilate the chapter concepts. They encourage readers to expand their knowledge through self-study as well as help prepare them for the team-oriented technical support environment by having them work with classmates in project groups or teams. Many of the end-of-chapter activities encourage readers to use information resources and solve problems—skills that are essential in the dynamic service desk industry.

Assumed Knowledge

This book assumes that readers have experience in the following areas, either through course work, work experience, or life experience:

- Basic service desk and customer service concepts
- Basic computer concepts or computer literacy
- Internet and World Wide Web concepts

Overview

The outline of this book takes a detailed look at the characteristics of excellent technical customer support and at the business skills, soft skills, and self-management skills needed to deliver it. Each chapter explores in detail a particular skill required to provide effective customer support and includes proven techniques for implementing the concepts.

Chapter 1, Achieving High Customer Satisfaction, explores what is involved in delivering excellent customer support, the role of the service desk and all of the technical support providers within a support organization, and trends influencing the service desk role. It also discusses the mix of business, technical, soft, and self-management skills required in today's dynamic technical support setting.

Chapter 2, Developing Strong Listening and Communication Skills, focuses on how support providers can become better listeners and communicate effectively with customers and coworkers. These skills are considered the two most basic and important skills that support providers must possess.

Chapter 3, Winning Telephone Skills, discusses the skills that support providers need to interact with customers over the telephone as well as how to avoid the most common call handling mistakes. This chapter helps support providers develop excellent telephone skills that will send a positive, professional message to customers.

Chapter 4, Technical Writing Skills for Support Professionals, discusses the impact that technologies such as the Internet, email, instant messaging, chat, knowledge management systems, and social media have had on the service desk in terms of how it collects information and delivers support. It also discusses how these changes have prompted the need for support professionals to add technical writing to their list of required skills. This chapter describes the characteristics of good technical writing and provides tips and techniques to help support providers improve their writing skills.

Chapter 5, Handling Difficult Customer Situations, focuses on the leading cause of stress in customer support—difficult situations such as calming irate customers, handling extremely demanding customers, and saying no to customers while maintaining their goodwill. This chapter includes specific techniques for handling difficult situations and minimizing the frustration and stress support providers may feel afterward.

Chapter 6, Solving and Preventing Incidents and Problems, presents a methodical approach that support providers can use to navigate the incident management process, along with proven problem-solving techniques to diagnose and resolve incidents. It discusses the concept of incident ownership and describes when and how to communicate the status of incident resolution activities to customers and management. It also discusses how to use the problem management process to prevent incidents by identifying and eliminating the root cause of problems.

Chapter 7, Business Skills for Technical Professionals, introduces some of the business topics and disciplines technical professionals may encounter when they join the workforce. This chapter also describes advanced business skills that managers are increasingly requiring more senior technical professionals to acquire and use, such as project management, cost-benefit analysis, and return on investment analysis.

Chapter 8, Teams and Team Players in a Service Desk Setting, discusses the fact that customer support is an ideal environment for working in teams due to the complexity of the work and the diversity of skills required. This chapter helps support providers understand their role in the service desk and the support organization, and how to respect and value their team members' contributions.

Chapter 9, Minimizing Stress and Avoiding Burnout, deals with the fact that customer support is one of the most stressful professions. It helps support providers determine the factors that may be causing them stress and provides specific techniques they can use to manage their stress, time, and workload as well as avoid the physical and emotional exhaustion—burnout—caused by long-term stress.

New to This Edition

Concepts and features new to this edition include:

- **Up-to-Date Concepts.** Up-to-date research and resources are referenced throughout the text. Chapter 1 provides an in-depth overview of current support industry trends and how those trends are influencing the skills needed by service desk professionals.
- **Up-to-Date Interviews.** Comprehensive interviews with industry professionals performing a variety of roles in the service desk industry appear throughout the text.
- **Strategic, Proactive Service Desk.** Chapter 1 describes the transition from reactive help desk to strategic, proactive service desk. Service desk best practices are reflected throughout the remaining chapters.
- **Social Support.** Chapter 1 introduces the rise of social media as a support channel and specific techniques for leveraging social media technologies are described throughout the text.
- **Technical Writing.** Chapter 4 has been expanded to include topics such as Knowledge-Centered Support (KCS), blogs, and developing scripts for successful videos.
- **Emerging Concepts.** Chapter 7 introduces the emerging business productivity team and enterprise genius bar concepts.
- **DevOps.** Chapter 8 introduces the DevOps movement and describes the role of the service desk in DevOps.
- **ITIL 2011.** References to ITIL best practices throughout the text have been updated to reflect ITIL 2011.

Features

To aid you in fully understanding service desk concepts, the following features in this book are designed to improve its pedagogical value:

Chapter Objectives. Each chapter in this book begins with a list of the important concepts to be mastered within the chapter. This list provides you with a quick reference to the contents of the chapter as well as a useful study aid.

Illustrations, Photographs, and Tables. Illustrations and photographs help you visualize common components and relationships. Tables list conceptual items and examples in a visual and readable format.



Notes. Notes expand on the section topic and include resource references, additional examples, and ancillary information.



Tips. Tips provide practical advice and proven strategies related to the concept being discussed.



Want More Info? Want More Info? pointers direct you to other chapters in the text or the Internet for more information about a topic, an example related to the chapter content, and other points of interest.

Bulleted Figures. Selected figures contain bullets that summarize important points to give you an overview of upcoming discussion points and to later help you review material.

Interviews. Interviews detail real-life examples of the chapter topic. Using a case study approach, interviews describe actual experiences and confirm the importance of the topic. Also, interviews with industry experts expand upon and give additional insight into real-world applications of the topic.

Case Studies. Case Studies introduce and explore a concept related to the chapter content. They provide helpful information that give a broader perspective of the service desk industry.

Chapter Summaries. Each chapter's text is followed by a summary of chapter concepts. These concise summaries provide a helpful way to recap and revisit the ideas covered in each chapter.

Key Terms. Each chapter contains a listing of the boldfaced terms introduced in the chapter and a short definition of each. This listing provides a convenient way to review the vocabulary you have learned.

Review Questions. End-of-chapter assessment activities begin with a set of at least 30 review questions that reinforce the main ideas introduced in each chapter. These questions ensure that you have mastered the concepts and have understood the information you have learned.

Hands-On Projects. Although it is important to understand the concepts behind service desk topics, no amount of theory can improve on real-world experience. To this end, along with conceptual explanations, each chapter provides eight to ten Hands-On Projects aimed at providing practical experience in service desk topics. Some of these include applying service desk concepts to your personal life and researching information from printed resources, the Internet, and people who work in or have experience with the support industry. Because the Hands-On Projects ask you to go beyond the boundaries of the text itself, they provide you with practice implementing service desk concepts in real-world situations.

Case Projects. The Case Projects at the end of each chapter are designed to help you apply what you have learned to business situations much like those you can expect to encounter in a service desk position. They give you the opportunity to independently synthesize and evaluate information, examine potential solutions, and make recommendations, much as you would in an actual business situation.

Capstone Project. The Capstone Project is designed to be an active learning experience that brings together in a real-world setting all of the concepts and techniques described in this book.

Instructor Resources

The following teaching tools are available to the instructor for download through our Instructor Companion Site at sso.cengage.com.

Electronic Instructor’s Manual. The Instructor’s Manual that accompanies this textbook includes additional instructional material to assist in class preparation, including teaching tips, quick quizzes, class discussion topics, and additional projects.

Test Bank. Cengage Learning Testing Powered by Cognero is a flexible, online system that allows you to:

- Author, edit, and manage test bank content from multiple Cengage Learning solutions.
- Create multiple test versions in an instant.
- Deliver tests from your LMS, your classroom, or anywhere you want.

PowerPoint Presentations. This book comes with Microsoft PowerPoint slides for each chapter. These slides are included as a teaching aid for classroom presentation; teachers can make them available on the network for chapter review, or print them for classroom distribution. Instructors can add their own slides for additional topics they introduce to the class.

Solution Files. Solutions to all Review Questions are provided.

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Love and thanks to my family and friends who suffer the neglect that comes with any book project. Good news! It’s done! I greatly appreciate your support and encouragement.

Finally, I tip my hat to the thousands of service desk professionals who are out there doing a great job day in and day out. Your efforts have enabled this industry to become what it is—an exciting and growing professional career choice. You have a tough job and you rarely receive the support and respect that you deserve for doing it. I hope through this book you see that you certainly have mine.

*Donna Knapp
Tampa, Florida*

Achieving High Customer Satisfaction

In this chapter you will learn:

- ⦿ The role the service desk plays in delivering high-quality technical customer support
- ⦿ The four components of a successful service desk
- ⦿ Trends influencing the service desk
- ⦿ What customers need and expect
- ⦿ How to meet and exceed customer expectations
- ⦿ The mix of skills needed for a career in technical customer support

Technology pervades our lives. People of all ages, backgrounds, and skill levels use information and communications technology at work, at school, and at home. Mobile devices such as smartphones and tablets enable people to use technology anywhere. This widespread use of technology results in an enormous need for technical support. Many companies meet this need by setting up service desks. A **service desk** is a single point of contact within a company for managing customer incidents and service requests. Companies worldwide know that they must provide high-quality customer service and support if they want to survive in today's fiercely competitive business environment. Companies also know that today's savvy and self-sufficient technology users expect easy access to a wide range of support services. They expect options. The service desk plays an extremely important role in delivering that service and support.

An integral component of the service desk is people. Having the right people on a service desk facilitates high customer satisfaction. Finding and keeping people who enjoy working with technology and helping customers is a great challenge facing companies. Historically, the service desk was considered a stepping stone to other professions within the information technology (IT) industry. Today, the service desk has been elevated to a profession in and of itself and provides a tremendous opportunity for people who want to pursue an exciting career in the IT field. Because the service desk is such a critical part of any customer-oriented business, people who possess the skills needed to deliver high-quality customer service and technical support are extremely valuable and highly employable. To work in a service desk, you must possess a mix of skills, including business skills, technical skills, soft skills, and self-management skills. You must understand the characteristics of high-quality customer service and technical support. Finally, you must understand that how you interact with each and every customer influences that customer's perception of your company and its products and services.

Delivering High-Quality Technical Customer Support

We are living in a connected age, and the technology we employ to obtain and use information and to stay connected has found its way into every aspect of our lives. For the average person, it can be a challenge to keep that technology up and running and get it to do what he or she wants and needs it to do. A person may turn to any number of service desks for support. For example, to obtain assistance with a personal mobile device, a person may call, chat online with, or walk into a retail store of a product manufacturer or service provider. When at home, that person may contact the particular company that manufactured his or her computer or the company that publishes a software package he or she uses. When at work, that person may contact his or her company's service desk for aid in using programs that are unique to that company. A person working as a service desk analyst may even contact other service desks, such as a vendor's service desk, for assistance in diagnosing a hardware, software, or network incident. How a service desk treats people influences their level of satisfaction and perception of the entire company and its products. People's level of satisfaction with and perception of a company can determine whether that company succeeds or fails.

Customer Support and the Service Desk Role

The role of the service desk has evolved considerably since the late 1970s when organizations first began directing technology users to a single point of contact for support. Known initially

as the “help desk,” this function was originally established simply to screen calls, determine the nature of the call, and then **dispatch**, or send, a vendor or other technical support specialist to the customer’s site. A **help desk** is a single point of contact within a company for technology-related questions and incidents. Today, the service desk offers a broader range of services and is a key part of any technical support organization.

Technical support refers to the wide range of services that enable people and companies to effectively use the information technology they acquired or developed. Technical support services include selecting and installing the hardware, software, network, and application components that enable technology users to do their work; keeping the systems and devices in good repair; upgrading hardware, software, and application components when needed; and providing customer support. **Customer support** includes services that help a customer understand and benefit from a product’s capabilities by answering questions, solving problems, and providing training. The service industry makes the distinction that a **customer** buys products or services and a **user** consumes products or services. This distinction is made to clarify that customers are individuals with budgeting responsibilities and so are responsible for making purchasing decisions and for negotiating agreements or contracts. For example, the managers (customers) within an organization typically make purchasing decisions based on both their employees’ (users) requirements and the organization’s financial constraints. However, it is important to note that in practice, many organizations—and this text—informally use the term *customer* instead of *user* in recognition of the service desk’s role as a customer service organization. Many companies consider the service desk a strategic corporate resource because of its constant interaction with the company’s external customers, internal employees, vendors, and partners.

Customer service and support organizations come in all shapes and sizes and deliver a wide range of services. These organizations can be either a company or a department within a company devoted to customer service and support. One type of customer service and support organization is a **call center**, which is a place where telephone calls are made or received in high volume. The term **contact center** refers to a call center that uses technologies such as email and the web in addition to the telephone to communicate with its customers. These various routes of communication to and from the service desk are typically called **channels**.

Major businesses use call or contact centers because they need to handle a high volume of customer contacts. A cost-efficient solution is to handle these contacts from one or more centralized locations. The actual services delivered by each call or contact center vary, and the services provided may or may not be technology oriented.

Examples of call centers and contact centers include airline reservation centers, catalog ordering centers, and home shopping centers. Large software publishers and hardware manufacturers such as Apple, Dell, Hewlett-Packard, and Microsoft use call or contact centers to provide technical and customer support. Large corporations may use call or contact centers to provide technical and customer support to internal employees. Or, large corporations may **outsource** their support services—that is, have services provided by an outside supplier instead of providing them in-house. These suppliers typically run call centers that serve the employees or customers of many corporations.

The help desk and the service desk are also customer service and support organizations. This book focuses on the service desk, a successor to the help desk. Simply put, a service desk is a help desk with a broader scope of responsibilities.

The transition from help desk to service desk was prompted mainly by wide-scale adoption in the mid 1990s of the **Information Technology Infrastructure Library® (ITIL®)**, which is a set of best practices for IT service management. A **best practice** is a proven way of completing a task to produce a near optimum result. Best practices are proven over time through experience and research to work for a large number and variety of people and organizations. **IT service management (ITSM)** is a discipline for managing IT services that focuses on the quality of those services and the relationship that the IT organization has with its customers. An **IT service** is a service that is based on the use of information technology and supports business processes.



ITIL was developed in the 1980s by the United Kingdom government's Central Computer and Telecommunications Agency (CCTA) and consists of a series of books that gives best practice guidance on IT service management-related topics.

A fundamental premise of ITIL is that IT organizations must adopt a service-oriented approach to managing IT services, instead of the traditional product- or technology-centric approaches. In other words, IT organizations must recognize their role as service providers and strive to satisfy their customers' requirements. This philosophy applies whether IT serves internal customers, such as other departments or divisions within the same company, or external customers. ITIL provides guidance that IT organizations can use to meet customer needs by managing IT services as efficiently and effectively as possible.

ITIL considers technical and customer support vitally important, and it introduced organizations to the concept of the service desk. In addition to managing customer incidents, ITIL considers the service desk responsible for handling service requests and communications with customers.

ITIL defines an **incident** as an unplanned interruption to an IT service or a reduction in the quality of an IT service. Common incidents include a broken device, an error message, and a system outage. Historically, such unplanned events were referred to as problems (and still are in some organizations). ITIL, however, defines a **problem** as the cause of one or more incidents. Common problems include hardware defects, corrupt files, software errors or bugs, and human error. ITIL defines a **service request** as a formal request from a user for something to be provided. Common service requests may include requests for information, advice, or a standard change. Common standard changes may include installing preapproved software, setting up a new employee within an organization, or providing access to an IT service.



Some organizations handle password reset requests as incidents, while others view them as service requests.

Although this book focuses on the service desk, many of the concepts covered in this book apply to any organization devoted to customer service and support. Skills such as listening and communicating (Chapter 2), creating a positive telephone image (Chapter 3), effective writing skills (Chapter 4), and handling difficult situations (Chapter 5) are important in any profession, but are particularly important when dealing with customers.

The service desk makes a significant contribution to business goals by providing a single point of contact for all technical and customer support services, delivering value to customers, and capturing and distributing information. Because people working in a service desk have daily contact with customers, they enjoy a unique opportunity to capture an enormous amount of information about customers' wants and needs. Successful service desks share this information with managers and other groups within the organization that are involved in supporting customers.

The service desk and these other support groups are often structured in a series of levels, an approach commonly known as a multi-level support model. In a **multi-level support model**, shown in Figure 1-1, the service desk refers incidents it cannot resolve to the appropriate internal group, external vendor, or subject matter expert. Level one is the service desk because it is the first point of contact for customers. If the level one service desk cannot resolve an incident, it hands off the incident to the next highest level, level two. Level two might consist of a support group for a particular software application or a network support group. Level two might be a specialist group within the service desk team that has greater technical skills or authority than the front-line service desk analysts who initially handle incidents. If level two cannot resolve the incident, then it hands off the incident to level three, which is usually a software vendor, a hardware vendor, or a subject matter expert. A **subject matter expert (SME)** is a person who has a high level of experience or knowledge about a particular subject.

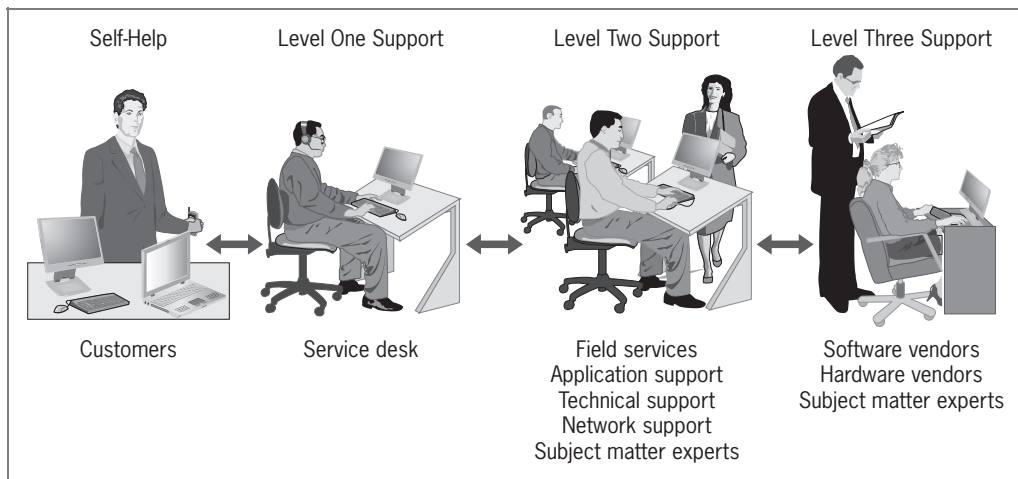


Figure 1-1 Multi-level support model

In the context of a multi-level support model, customers solving incidents on their own is known as **level zero** or tier zero and may also be referred to as **self-help**. Self-help services

such as a service desk web site that contains answers to frequently asked questions (FAQs) and a knowledge base of solutions empower customers to support themselves.

The goal of this multi-level support model is to have the service desk resolve as many incidents as possible at level one. This approach ensures the most efficient use of level two and three resources.

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In an effort to satisfy their customers, the industry average is for IT service desks to resolve just under 66 percent of reported incidents at level one according to HDI, an international membership association that focuses on the needs of internal and external support organizations (2013 Support Center Practices and Salary Report, HDI). They also take ownership of all incidents, whether or not they can resolve them. Taking **ownership** of an incident means tracking the incident to ensure that the customer is kept informed about the status of the incident, that the incident is resolved within the expected time frame, and that the customer is satisfied with the final resolution.

Not all service desks require three levels of support. Technology and a broader scope of responsibilities are making it possible for many level one service desks to function at a much higher level than in the past, eliminating the need for a third level. Also, it is not uncommon for smaller service desks to have only two levels of support. This is particularly true in organizations that support primarily off-the-shelf computer software products or cloud-based applications. In those organizations, a level one analyst who cannot resolve an incident contacts the appropriate vendor.

Historically, the level one service desk delivered customer support services, and the level two groups handled technical support services such as repairing systems and upgrading hardware and software when needed. As the support industry has evolved, that division of responsibilities has changed. Many companies have consolidated some or all of their support services into the service desk in an effort to deliver faster, more cost-effective services.

This consolidation of support services has many benefits. The service desk handles incidents and service requests with greater efficiency because it hands off fewer incidents and service requests to other groups. This increases the value of its services to customers and the company. Level two and level three support groups can focus on their primary responsibilities, which include tasks such as projects, operational activities, and maintenance activities. The company achieves a maximum return on its investment in the service desk.

Technology also makes it possible for the service desk to absorb many activities that relate directly to the customer from other support groups, such as network support, field support, and system administration. Available technologies may include:

- **Knowledge management systems (KMSs)**—Tools and databases that are used to store, manage, and present information sources such as customer information, documents, policies and procedures, incident resolutions, and known errors. The databases that underpin a knowledge management system may be referred to as knowledge bases or known error databases. A **knowledge base** is a logical database that contains data used by a knowledge management system. A **known error** is a problem that has a documented root cause and a workaround. A **known error database (KEDB)** is a database that contains known error records.

- **Configuration management systems (CMSs)**—Tools and databases for managing IT asset information and linking that information to related incidents, problems, known errors, changes, and releases.
- **Network monitoring systems**—Tools used to observe network performance.
- **Remote control and diagnostic systems**—Systems that allow the service desk to take remote control of the keyboard, screen, or mouse of connected devices and then troubleshoot problems, transfer files, and even provide informal training by viewing or operating the customer's screen.

By expanding its responsibilities to include activities such as network monitoring and network and system administration, the service desk can be more proactive and timely because it does not have to engage other groups to perform these tasks. **Network monitoring** involves activities that use tools to observe network performance in an effort to minimize the impact of incidents. **Network and system administration** activities include day-to-day tasks such as setting up and maintaining user accounts, ensuring that the data the company collects is secure, and performing email and database management.

The web has also had a profound impact on the support industry. According to HDI, 63 percent of service desks maintain web sites that provide customers with self-help or self-service options such as the ability to report incidents, submit service requests, obtain answers to FAQs, and search online help systems or knowledge bases (2013 Support Center Practices and Salary Report, HDI). Empowering customers to help themselves increases customer satisfaction because customers can get the help they need when they need it. Self-services also benefit support organizations because they are a cost-effective way for the service desk to assist large numbers of customers while freeing human resources to work on more complex incidents and service requests.

The technical support services that a company delivers as well as how and by whom those services are delivered vary according to company size, company goals, and customer expectations. The service desk contributes significantly to its company or department by serving as the first point of contact for all technical support services and by taking ownership and ensuring that customer incidents and service requests are resolved as quickly and cost effectively as possible.

Components of a Successful Service Desk

A successful service desk plays an important role in providing high-quality technical customer support. A successful service desk also is made up of several tightly integrated components. Each component relates to the others in some way and, together, these components enable the service desk to satisfy customers. Four critical components—people, processes, technology, and information—determine a service desk's success.

People

The **people** component consists of the staff and structure put in place within a company or department to support its customers by performing processes. The principal roles played by

people who work in a service desk include the **front-line service providers**, who interact directly with customers. Although titles and job descriptions vary from one service desk to the next, front-line service provider positions include dispatcher or call screener, level one analyst, and level one specialist. Depending on the size of the organization, service desk management positions include service desk supervisor or team leader, service desk manager, and senior service desk manager.

Several supporting roles such as knowledge management system administrator, technical support, and training are also important and commonplace in the service desk. A **knowledge engineer**, also called a **knowledge base administrator (KBA)**, develops and oversees the knowledge management process and ensures the information contained in the knowledge management system is accurate, complete, and current. Technical support staff maintains the hardware, software, and applications used by the service desk. Training staff ensures the service desk team receives training that addresses the business, technical, soft, and self-management skills it needs.

Processes

A **process** is a collection of interrelated work activities that take a set of specific *inputs* and produce a set of specific *outputs* that are of value to a customer. **Value** is the perceived worth, usefulness, or importance of a product or service to a customer. The consistent use of processes leads to customer confidence and employee satisfaction because customers and service desk employees know what and how something needs to be done and the time frame within which it needs to be done. Some common processes found in a service desk include incident management, problem management, request fulfillment, knowledge management, access management, and service level management.

Technology

In a service desk setting, people use a wide array of tools and technologies—collectively referred to as technology—to do their work. A **tool** is a product or device that automates or facilitates a person's work. A **technology** is an invention, process, or method that enables the creation and enhancement of tools. Service desk employees and managers use technology to perform processes. They also use technology to capture, use, and share information about their customers and their work. Service desks use technology to automate routine tasks such as password resets and to automatically distribute software. Service desks also use technology to enable self-help and self-service and to facilitate communication and collaboration with their customers and other support groups. Some tools found in a typical service desk include incident management systems, knowledge management systems, telephone systems, web-based systems, and Web 2.0 technologies.



Web 2.0 is a concept that emphasizes enabling web users to interact, collaborate, and generate content via blogs, wikis, and social networking sites, for example, rather than passively view content created by others.

Incident management systems offer enhanced trouble ticketing and management reporting capability. Incident management systems are the technology used to log and track customer incidents and service requests. Incidents and service requests are often collectively called contacts. **Contact** is a generic term used to describe different types of customer transactions such as questions, incidents, and service request. By logging all customer contacts, the service desk prevents a common customer complaint, which is that incidents and service requests are lost or forgotten. Furthermore, when analysts log all contacts in an incident management system, they can use the many features this tool provides to track contacts from start to finish. For example, many incident management systems generate alerts that remind analysts to periodically contact customers with status updates when incidents cannot be resolved immediately. Many systems also allow analysts to access a knowledge management system.

Information

Information is data that is organized in a meaningful way. People need information to do their work. For example, service desk analysts need information about customers and the details of their incidents and service requests to provide support. Management needs information to evaluate team and individual performance and identify improvement opportunities. For example, service desk managers need information that tells them how quickly, completely, and accurately services are delivered. Other groups within the organization need information about the company's customers. For example, a company's Research and Development department needs information about how customers are using the company's products and services, and how customers would like those products and services to be improved. Without data, service desks have trouble creating the information required to understand customer needs and expectations and measure customer satisfaction. Consequently, successful companies consider information a resource in the same way that well-trained employees, well-defined processes, and well-implemented technology are resources. Types of data captured by service desks include customer data, incident data, status data, and resolution data.

People working in a service desk must understand that customers, managers, and coworkers use the data they collect on a daily basis to create information. The knowledge gained by analyzing this data and information can be used to increase customer satisfaction, enhance productivity, improve the quality of products and services, increase the efficiency and effectiveness with which services are delivered, and create new products and services.

Of the four components, people are by far the most important and expensive component of a service desk. Finding qualified people to deliver high-quality customer support is a great challenge being faced throughout the support industry. People are the most important component because customers are people who have feelings and expectations that only other people can understand. In fact, customers do not buy products or services so much as they buy expectations. Customer **expectations**, results that customers consider reasonable or due to them, are a moving target, and it is this movement that makes it so difficult for companies to get and stay ahead.

Customer expectations are a moving target for a number of reasons. As customers become more dependent on technology, they become more demanding of the support they require.