



Steps to an efficient Helpdesk Team

Released: March 2011



Executive Summary

All helpdesk managers are under the continuous pressures of ensuring customers are served to high degrees of satisfaction whilst maintaining personnel morale in a world of ever reducing resources. These seemingly opposing issues are marred by the fact that customers only contact the helpdesk when they have a problem and then demand the solution as quickly as possible. The quicker an engineer can resolve a customer's problems the more satisfied they'll be and the helpdesk will run at greater efficiency.

So, how can engineers resolve customer problems in the quickest possible manner? Clearly, the detail of each individual problem will directly affect the timing, but across all issues there are a number of strategies that will reduce workload, increase efficiency and improve customer satisfaction (all important KPI's in the world of the helpdesk manager).

- **INFORMATION - Give engineers the information they need**

Looking up customer or product information in disparate locations requires memory, training and takes up valuable time. Make as much information as possible that they might need immediately to hand.

- **TOOLS - Use the right tools for the job**

It is vital that the ticketing system is designed to be just that - for the helpdesk engineer, the system is the centre of their ecosystem and needs to work with them not against them. Engineers will be more productive if they enjoy using their tools, not get frustrated by them.

- **QUALITY - Help engineers reduce improve the quality of their work**

Email is a good example to mention - copy and pasting from an email client into your helpdesk system is a pointless waste of time, has no audit trail, and is prone to mistakes. If email is a core component to the helpdesk, then the ticketing system should handle email directly. When working a ticket, it's important to collect the right data and provide back the right information. With human memories not always 100% reliable, your ticketing system needs to provide the prompts and guidance to ensure engineers focus their efforts on the right priorities.

- **FOCUS - Give customers access and engineers focus**

Self-Service is an expected part of modern helpdesk interaction. By providing customers with access to support information and updates, they only disturb your engineers when they really need to – allowing your engineers to focus on finding the fixes and not playing voicemail tennis.

Clearly each helpdesk manager will have their own particular views on these points, but whether the helpdesk is internal or external facing, triage or deep third line, we believe that these are core issues for a well functioning operation.



Give them all the information they need

When a customer contacts the helpdesk with a problem, there's nothing more frustrating than the engineer asking or worse still re-asking seemingly dumb questions to gain information that they should already know. If the information isn't directly to hand for the engineer then he has Hobson's choice of spending time going to find the information or take the quicker route of asking the dumb questions – clearly, either way isn't ideal.

The perfect situation is to have all your customer information easily to hand for the engineer to peruse and refer to. A large part of this is achieved in centralising and structuring the information in a consistent format - having the information directly accessible from within the ticketing system also saves precious time. For the engineer to know exactly what assets the customer has is invaluable - from a single serial number can come the make, model, version, configuration and support contract details - the sort of vital information that the customer might not now know how to find.

With engineers needing to support a customer user base of potentially hundreds or thousands of end users, it's important that information is easy to find from simple reference points such as an asset number, ticket reference or a user's name. Anything more complex than this will result in wasted time and energy.

Make their life easier

On the whole, support engineers are motivated by interacting with customers and solving their problems – after all it's what they spend most of their work time doing. The ticketing system acts as either a facilitator to them achieving these goals or an annoying hindrance.

When an engineer is talking to a customer, their focus should be solely on information gathering and problem diagnosis, not on how to use the ticketing system. An intuitive and responsive ticketing system UI is therefore an often overlooked and yet critical aspect of ensuring a helpdesk engineer works efficiently. A good design will make it second nature for an engineer to gather and log all the information needed for a new ticket, with all functions immediately and obviously to hand.

As well as taking new tickets, engineers need to be able to find existing tickets quickly, minimising the time customers are waiting for them to get up to speed. A search engine that provides the flexibility to perform a broad range of searches will help the engineer find tickets quickly and accurately.

With the internet access now ubiquitous, and work practices evolving - why wouldn't you want your engineers to be able to keep an eye on tickets when they are away from the office? If they think of a solution in the metaphorical "bath", wouldn't it be good for them to be able to update the ticket there and then, preventing other engineers wasting time working on the same problem and getting the customer the earliest possible update. With smartphones being fast, affordable and always connected, they provide the ideal means to keep your engineers in touch with your ticketing system.



Help them reduce their own mistakes

Everyone is human, including engineers! Therefore, the ticketing system they use needs to help them minimise mistakes by not forcing them to take unnecessary steps and providing intelligent prompts to help them get things right.

Processing of inbound emails is a classic opportunity for engineers to inadvertently get things wrong by a simple missed keystroke. If your agents are using a separate mail client and “Copy & Pasting” into the ticketing system it’s only a matter of time before the wrong text gets pasted without being noticed, multiple tickets get opened for the same issue or the email gets ignored completely. Creating and sending outbound emails has the potential of sending customer sensitive information to the wrong customer, which comes with it’s own set of issues both reputational and legal. Lastly on this point, this activity is a waste of engineer time, the ticketing system should handle email and nothing else - ensuring quality, auditability and efficiency.

Likewise, it’s best not to rely on staff memories to ensure that tickets don’t get forgotten - vital when you need to meet your SLA targets. Fully configurable notifications and monitoring screens that you can project on a large screen can be highly effective in ensuring focus is provided in the correct areas.

With engineer’s brains often working much faster than they type, and not every engineer being baccalaureate material, small things like spell checkers will help engineers to spot and correct their mistakes before the customer sees them.

Reduce the work they have to do

If you want your engineers to be efficient, one of the best and obvious ways is to identify and automate repeatable task, such as chase emails. Having the helpdesk system automatically send out customer updates or reminders is an easy timesaver and most likely, a morale booster. Templates for standard problem responses will not only improve the turn around time, but improve consistency.

A good way to keep engineers focussed is to have your customers create or update tickets themselves - great for less important issues or busy customers. Providing a customer portal to raise new tickets or provide updates, can be an easy win, and for most users, an expected offering. For some companies, tickets might need to be raised in response to non-human activity - an API integration project could allow the automation of new issues feeding into the helpdesk system.



Conclusion

Every helpdesk will have their own requirements, pressures and measures, but fundamentally they need to process issues quickly and accurately without consuming huge resources. IssueCentre is designed to be the core tool of any helpdesk, providing all the functionality required without having to confuse engineers or blow the budget.

We referenced four key points - INFORMATION, TOOLS, QUALITY & FOCUS at the start of this document. IssueCentre addresses these points.

INFORMATION - IssueCentre centralises all relevant data for you and your customers

TOOLS - IssueCentre is designed to fulfil the requirements of a helpdesk professional

FOCUS - IssueCentre keeps an engineer's focus on the task at hand

QUALITY - With the right tools, data and focus, the result can only create an improvement in service and quality.

Getting Started

Please contact us on +44 (0)333 9001123 or email us at sales@issuecentre.com to find out how IssueCentre can make your helpdesk team more efficient for just a low monthly fee.

Alternatively, sign up for a 14 day totally free trial at www.issuecentre.com/trialsignup.php.

About IssueCentre

IssueCentre is a web-based Ticket Tracking and management system for companies and user groups of all sizes. It provides fast data entry, extensive configurability and easy management.

IssueCentre is developed and owned by First Option Solutions. Find out more about IssueCentre at www.issuecentre.com.