

Five Key Initiatives To Wow Your Workforce With Your Service Desk

Extend Your Service Desk Automation Now

by Elinor Klavens and Eveline Oehrlich

September 18, 2015

Why Read This Report

Each interaction between your employees and your service desk affects the reputation of the entire infrastructure and operations (I&O) team. To delight (or, as we like to say, wow) members of your workforce, they must see you as effective, pleasant, and easy to work with. The service desk is the single point of contact for all business and technology service questions and an essential communication platform for all the operational processes in technology management. The service desk is also responsible for answering, escalating, and resolving enablement issues for other teams within technology management and other players in the ecosystem. This report provides I&O pros with five steps to creating a service desk that is internally and externally effective.

Key Takeaways

Members Of Your Workforce Need Your Service Desk To Help Them Stay Productive

The service desk plays a crucial role in ensuring that your workforce has the necessary tools to achieve productivity and flow. The service desk is therefore a critical link in the workforce enablement value chain to your goal of winning, serving, and retaining customers.

Radically Improve Moments Of Truth With New Workforce Enablement Building Blocks

If you want to wow your workforce, you must deliver at the moment of truth, when your workforce interacts with you. To improve these moments, design services that are pain-free, predictive, personalized, and productive.

Step Up The Automation Pace With Your Automation Solution

Reducing costs and increasing agent and customer satisfaction by leveraging automation capabilities within your service desk or IT service management solutions will go a long way toward improving your moments of truth.

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September 18, 2015

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Forrester used data from our Global Business Technographics® Devices And Security Workforce Survey, 2015, and the HDI Desktop Support Salary And Practices Report, 2014.

Related Research Documents

[Brief: Good DevOps Requires Collaboration, Automation, And Cultural Change](#)

[Setting The IT Service Desk On Fire](#)

[The State And Best Practices Of Your Service Catalog Initiative](#)

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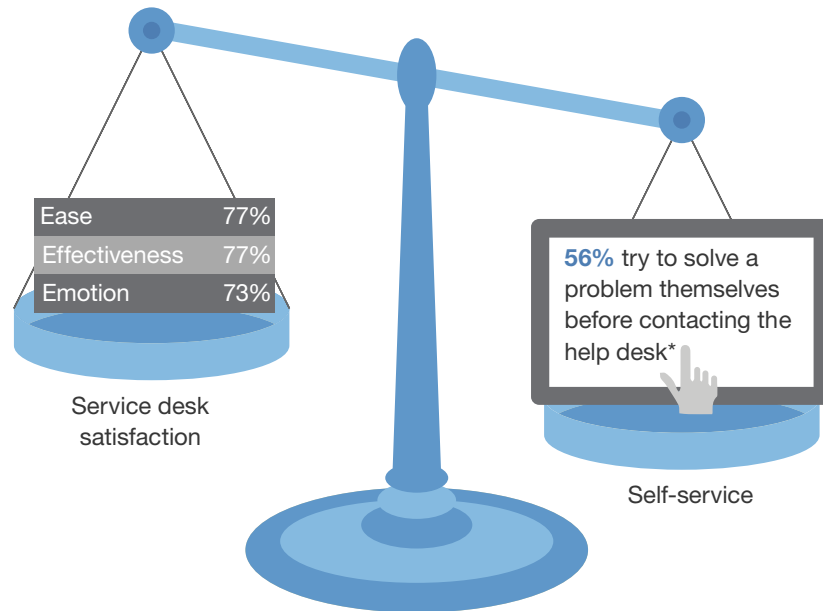
Your Service Desk Must Enhance Your Workforce's Productivity

Your service desk is more than a single point of contact for problems and issues with the business and technology used by your workforce — it can also enhance the productivity of your knowledge workers in their revenue-driving activities. Thus, the service desk needs to address the following key topics to increase the productivity of the workforce and, with it, the company's success:

- › **Keep the workforce in flow.** Each day is a maelstrom of tasks and technology. With each disruption to the day, such as getting locked out of an application or a lack of storage space on a device, an employee's ability to produce high-value work decreases.¹ Furthermore, disruptions to the workday mean that the workforce will focus on lesser-value activities and delay high-value tasks like planning and problem-solving.² Your service desk must resolve issues quickly via a dual strategy of efficient ticket resolution and self-service options.
- › **Leverage moments of truth.** Moments of truth, when applied to the service desk, are the interactions between the employee and the service desk staff member toward solving a problem.³ Each moment of truth with members of your workforce shapes their perception of I&O and the rest of technology management, so you must make sure each one results in a positive employee experience.
- › **Create an omnichannel service strategy.** Depending on your employees' preferences and mobility, an omnichannel strategy is the easiest and most effective way for your employees to request help. In Forrester's 2015 devices and security workforce survey, we asked business and technology decision-makers how they most recently contacted the service desk: 62% used a phone, 46% used email, and 27% went in person.⁴ While the majority of these requests still go through traditional channels, many service desks are beginning to leverage request portals, instant messaging, and genius bars. As employee expectations around omnichannel services grow, you must evolve your strategy to wow them in each channel.
- › **Provide self-service options.** Regardless of how great the service desk is, your company's workforce wants to solve problems themselves, and you want to encourage this habit. Self-service solutions are quicker and easier than submitting a ticket and cause minimal disruption to employees' productivity. Implementing self-service capabilities is a key building block in transforming your service desk into a center for workforce enablement. Don't let high satisfaction ratings fool you into thinking your customers don't want self-service: Even those who rate their service desk highly still attempt to solve problems themselves (see Figure 1).

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FIGURE 1 Even Customers Who Think Highly Of Their Service Desk Use Self-Service

Base: 4,081 global information workers who have interacted with internal tech support at work in the last three months

*Base: 6,192 global information workers who have interacted with internal tech support at work

Source: Forrester's Global Business Technographics® Devices And Security Workforce Survey, 2015

Wow Your Workforce By Mastering Five Key Areas

To increase your workforce's productivity while selfishly improving your reputation, service desk owners and teams can follow five key steps to achieve immediate results. Forrester recommends following these five steps to wow your workforce while improving the effectiveness of your service desk.

Step 1: Separate Incidents From Service Requests To Improve Service Delivery

ITIL v3 introduced the separation of service requests and incidents. Incidents are unplanned interruptions to a service, whereas service requests are employee demands for something they don't yet have.⁵ Separating the two is essential for pursuing your automation agenda. Incidents give insight into problems and increase your ability to be predictive. Service requests are repetitive tasks; analyzing which requests employees make most frequently will help you choose which processes to automate:

- › **Incidents keep your firefighters at work.** ITIL v3 defines an incident as an unplanned interruption to an IT service or reduction in the quality of an IT service.⁶ The keyword is "unplanned" — think email outages, server failures, stolen or lost hardware, and side effects from upgrades that affect

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application performance. An incident needs to be put out by the intrepid service desk firefighters. Your goal should be reducing incidents, which you can do with self-service technologies. Twenty-eight percent of service desks that were able to reduce ticket volumes did so through self-service.⁷

- › **Service requests point to automation opportunities.** Unlike incidents, which are unplanned issues, service requests are less urgent daily business wants and questions. Common service requests include requests for an IT asset (hardware or software), questions around technology items or services, or more sophisticated business requests such as onboarding new employees. Understand the categories and frequency of service requests and then automate these requests via a service catalog or service app store where employees can request and consume pre-established services or other items.⁸

Step 2: Evaluate Your Contemporary Workforce Enablement Building Blocks

How do you know whether you're providing the services your customers need? Your hierarchy of priorities may be drastically different than theirs. To determine how effectively you are serving your customers and to identify areas for improvement, you need to invert your service delivery approach and put yourself in your customers' shoes. Customer surveys do some of this, but a better path is to visit with your business units and understand where they would like to see improvements. Leverage the four building blocks of workforce enablement to guide your discussion and improvement activities (see Figure 2).⁹

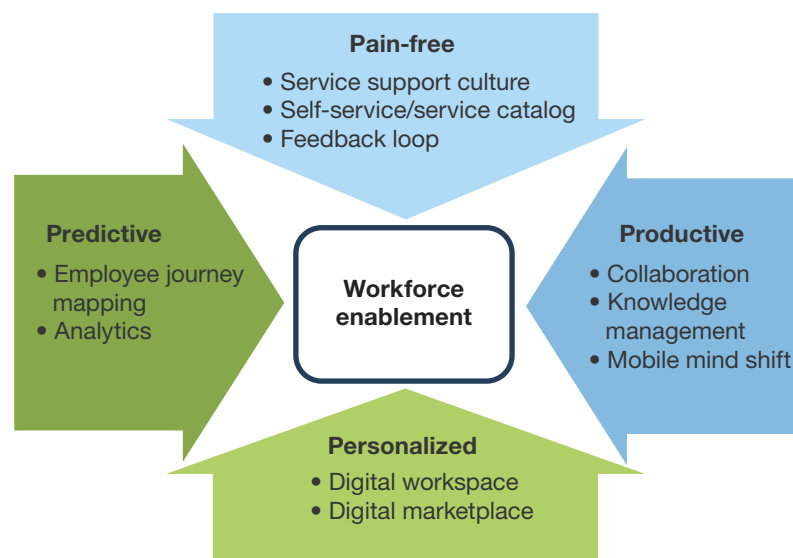
- › **Pain-free:** You must determine your employees' pain points in interacting with the service desk by using customer journey mapping, for example.¹⁰ Possible pain points range from slow response times, not knowing who to contact for help, lost service-desk tickets, unclear language in the self-service portal, and lack of ticket-status updates, and internal process issues. Use these findings to create a plan to address and improve these issues. Repeat this exercise as many times as necessary; implement the necessary changes and let your employees know you're taking corrective actions.
- › **Personalized:** Technology use varies by persona; understanding your customers and stakeholders is critical to personalizing your services and processes. Personalization could mean creating tiered self-service options for power and remote users, or identifying priorities based on seniority, such as flagging your VP's tickets over an intern's. Establishing context is also a type of personalization, such as creating custom views within portals or knowledge management systems so that users only see relevant content. Or you can use digital workspaces, which allow employees to access their own configurations and customizations from anywhere.¹¹ Lastly, personalization also includes the voice of your communications; the sales team wants to be spoken to in a very different way than your application development or finance team. Attention to personalization helps provide the right people with the right service.
- › **Predictive:** Forty-seven percent of service desks identified new applications and systems as a cause of increased ticket volumes; 41% cited new equipment and devices as another leading cause.¹² Predicting these events and proactively notifying customers of delays in service will

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decrease ticket volumes. Some events, such as call-volume monitoring, will allow you to predict and possibly change your staffing level accordingly. Also, integrating application performance management and event management solutions will allow you to predict issues before they impact the workforce, as they alert the service desk to issues and challenges within the managed environment. Submitting tickets annoys customers and adds to the already significant workload of the help desk, so proactive communication is a win-win. Using your predictive tools to analyze the supply and demand for goods and services will help you use your resources more effectively.

- › **Productive:** How are you enabling the productivity of your workforce? What technologies do your service desk analysts and workforce need to accomplish their daily tasks, processes, and decisions? Knowledge management and collaboration tools foster productivity. With an increasingly mobile workforce, I&O must also be attentive to services being easy to request and receive regardless of channel or location. Most members of your workforce are knowledge workers who are dependent on technology to accomplish their revenue-generating tasks. When a technology problem occurs, workers are jolted out of their flow and must redirect their attention to the problem.¹³ The goal of the service desk is to identify these flow-disrupting moments and minimize them.

FIGURE 2 The Four Building Blocks Of Workforce Enablement

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Step 3: Tirelessly Pursue Opportunities For Automation And Left-Shifting

Service desks are coping with complex demands and increasing ticket volumes. While 57% of service desks struggle with increased ticket volumes, only 31% are expanding headcount.¹⁴ Left-shifting is the solution to this conundrum of doing more with less. Left-shifting first identifies resolved issues within the service desk's tiered support model (level 1 to subject matter experts) then targets repetitive and reoccurring issues so that, for example, level 2 agents may document a common bug fix and share that knowledge with level 1 agents to resolve a ticket without escalation.¹⁵ Similarly, you can expand knowledge bases, community forums, and FAQs to help customers answer questions themselves. Ultimately, left-shifting provides the customer with self-service tools that provide an easier and more effective solution than submitting a ticket. Some best practices for left-shifting are:

- › **Identify your most frequent requests and automate them.** Some of the requests fielded by the service desk are repetitive in nature and great opportunities for automation. For most organizations, password resets are the majority of service requests; you can also automate other requests such as loaner laptops, granting or restricting access, and new account provisioning.
- › **Create request templates, which capture specifications the first time.** For generic requests, such as a hardware request or a new server build, having a standardized request fulfillment process ensures that you capture all the necessary information so that the customer receives the item exactly as requested.
- › **Review the escalation process and create new permissions.** Are your agents escalating the tiered support model due to lack of knowledge or lack of authorization? With each tier jump, the cost of the ticket increases; each tier is more expensive than the last. There are also handoff costs and loss of productivity to the requester as time-to-resolution increases.
- › **Ensure that customers receive status updates on requests.** Nothing frustrates a customer more than incomplete communication or having to nag until they get an update on a request for fear that the request has been forgotten. To automate a piece of the process, you must understand the full process.

Step 4: Equip Your Agents With The Skills They Need To Fulfill The Ambassador Role

The service desk is staffed with dedicated, knowledgeable individuals who provide a human face to your technology management organization. A service desk job is not short term or for nameless contractors. The service desk is a long-term career choice where agents can use their technical problem-solving and customer relationship skills to quickly and effectively solve technology problems. As such, provide your agents with:

- › **Soft skills training.** A clear and concise training plan for service desk agents helps reduce ticket volumes, increase employee retention, and improve your workforce's satisfaction with your services. The American Society for Talent and Development recommends 40 hours of training a year per person.¹⁶ Actual training levels within the service desk are sometimes much lower — 21% of level

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3 analysts and desk support technicians report no formal training.¹⁷ Working at a service desk demands technology skills training to keep up on new devices, systems, and applications, but it also requires soft skills training in communication, relationship-building, and organization. Learning how to validate the customer's issue and express concern can enhance the customer experience.¹⁸

- › **A clear promotion plan.** The additional skills employees learn during training supports employee retention and promotion to more senior-level positions. Promotions not only increase satisfaction, but they also make good financial sense: JD Professional Services estimates that it costs only \$21,000 to retain employees earning \$60,000, and \$150,000 to replace them.¹⁹ Your service desk has relationships with members of your workforce and the business teams they serve — a revolving door of staff and contractors in the service desk will diminish its reputation. Have a clear promotion plan to keep your best talent excited and motivated.
- › **An employee performance bonus plan.** You must equip your ambassadors with the skills they need to improve the reputation of the service desk while focusing on retention of your best talent. Creating a “bonus” element will further incentivize your staff to wow your workforce — currently, only 23% of service desks have bonuses integrated into all contracts.²⁰

Step 5: Enable Your Workforce With The Tools They Need

The only way your service desk will be able to manage the mountain of tasks and responsibilities before them is with the right set of automation tools. These tools allow your service desk team to provide consistent service, prioritize workloads, speed up service delivery, and ensure a happy and productive workforce. Your service desk must leverage the following automation technologies:

- › **Knowledge management.** Knowledge management technologies help you answer queries faster and better while delivering consistent service to customers.²¹ Twenty-six percent of service desks that were able to reduce ticket volumes employed knowledge management solutions.²² And knowledge management is integral to your self-service initiative. Among workers that resolved their own technology issues, 64% leveraged knowledge management and an additional 18% used informal knowledge from internal document-sharing sites like SharePoint.²³ Many IT service management (ITSM) solutions from vendors such as BMC, Cherwell Software, and ServiceNow include knowledge management abilities, but you'll have to actively promote their use. If you outsource your service desk or use contractors, knowledge management is a must-have technology. You can also use vendors like Right Answers to automate and gamify knowledge management.
- › **Remote control.** If you have a centralized help desk serving remote locations, home workers, or workers who travel frequently, you need a remote control solution. The mobility of your workforce should not be a barrier to supporting them and helping to quickly resolve their problems.²⁴ Remote control technologies allow for quick issue resolution. You can integrate remote control vendors such as Bomgar and LogMeIn into service desk or ITSM solutions.

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- › **Customer satisfaction surveys.** Understanding how well tech management is delivering services internally and to the business needs to be gauged with a survey strategy. For those using portals, you can include a simple one- to three-question survey following the completion of a survey request.²⁵ Emails are more difficult to manage and receive lower response rates, making a customer satisfaction tool essential. If you're already measuring customer satisfaction, fine-tune your approach to get feedback on the service desk performance beyond request management. If you are not currently measuring satisfaction, do not be afraid to start, as it is easier to make incremental gains from a difficult situation.
- › **Workflow analysis and automation.** You need tools to help you visualize workflows and understand the full life cycle of requests. Workflow analysis tools will illuminate the journey of the employee who wants to be supported, where and how workflow happens, and where and how to automate across these interactions. Once you can visualize the full life cycle, you can determine whether you're serving people the way they want to be served and which channels they prefer for which service. You can also preempt sticking points and create alerts so that bumps in service delivery do not constitute full stops.

Recommendations

Own Your Service Destiny Today

The demand on the service desk will be even greater in the future as new technologies and business models push companies into digital transformations. Eventually, new employees who are “digital natives” will make up your company's workforce. I&O pros must plan for how they're going to sustain these changes. Enhancing the productivity of your workforce is a great place to start — and it will ultimately influence the success of your company. So remember:

- › **Don't wait for a solid strategy — move.** Every service desk should have a vision and strategy. Sometimes these strategies take too long to get approved. Use the five steps to wow your workforce and then use the four P's to illuminate the priorities of your customers. Identifying your service gaps and major customer pain points is a major and crucial step.
- › **Speak to your harshest critics.** Your detractors are a great resource for pointing you toward process improvements. While they may currently have a negative relationship with your service desk, good or bad they care about what you do. Your biggest detractors can become your greatest advocates. This step is beyond pain-point information gathering, as you only want to speak with these customers when you are in a place to make the process improvements they need and deliver on your promises.
- › **Measure customer satisfaction creatively.** Surveys make a good benchmark but can fail to capture what really matters to your customers. Additionally, if your left-shifting self-service strategy is successful, you will have less interaction with happy customers. Reach out to executive assistants, power users, and project managers to gain a better picture of customer satisfaction.

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- › **Build a dedicated continuous improvement team.** Create a small team to review your incident data and develop a process to escalate incidents in an agreed-upon pattern, either via an escalation matrix or your service desk tool. Assign the right work to the right person. The goal should be to shift the resolution of the incident or fulfillment of a request to the most cost-effective level of support.
- › **Spread good news.** You are your own marketing department — if you don't speak up about your own successes, how will your customers know all the work you've done on their behalf? Once you begin to see successes, quantify them, name agents who were involved, and share it with the business. Share this information via reports, flyers, and posters to spread awareness about your achievements.

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Supplemental Material

Survey Methodology

Forrester's Global Business Technographics® Devices And Security Workforce Survey, 2015 is an online survey fielded in June and July of 2015 of 7,267 information workers located in Australia, Brazil, Canada, China, France, Germany, India, New Zealand, the UK, and the US from companies with two or more employees.

Forrester's Business Technographics provides demand-side insight into the priorities, investments, and customer journeys of business and technology decision-makers and the workforce across the globe. Forrester collects data insights from qualified respondents in 10 countries spanning the Americas, Europe, and Asia. Business Technographics uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

We have illustrated only a portion of the survey results in this document. To inquire about receiving full data results for an additional fee, please contact data@forrester.com or your Forrester account manager.

Endnotes

¹ For more information in enabling the productivity of your workforce, see the "[Habitat For Engagement: Unleash Workforce Potential With Agile Enablement](#)" Forrester report.

² For more information on flow and its effects on the workforce, see the "[A Crisis Of Attention: Technology, Productivity, And Flow](#)" Forrester report.

³ Source: Jan Carlzon, *Moments of Truth*, HarperBusiness, 1989.

For more on moments of truth as applied to the service desk, see the "[This Isn't Your Grandfather's Service Desk](#)" Forrester report.

⁴ Source: Forrester's Global Business Technographics® Devices And Security Workforce Survey, 2015.

⁵ Source: Randy A. Steinberg, ITIL Service Operation 2011 Edition: Best Management Practices, The Stationery Office, 2011.

⁶ Source: Randy A. Steinberg, ITIL Service Operation 2011 Edition: Best Management Practices, The Stationery Office, 2011.

⁷ Source: "2014 HDI Desktop Support Salary & Practices Report," Scribd, 2014 (<http://www.scribd.com/doc/226983225/2014-HDI-Desktop-Support-Practices-Salary-Report#scribd>).

⁸ For a discussion of service app stores, their attributes, and benefits to the business, see the "[Market Overview: Service App Stores](#)" Forrester report.

For more information on service app store brokering, see the "[Brief: The Modern Service Catalog Supports Service Brokering](#)" Forrester report.

⁹ For more information on the four pillars of service improvement, see the "[Trends 2015: The Future Of Customer Service](#)" Forrester report.

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¹⁰ To learn more about customer journey mapping, see the “[How To Map Your Customer Experience Ecosystem](#)” Forrester report.

¹¹ For more information on how to create a digital workspace strategy, see the “[Build Digital Workspace Delivery Systems To Give Employees The Right Tools For Their Job](#)” Forrester report.

¹² Source: “2014 HDI Desktop Support Salary & Practices Report,” Scribd, 2014 (<http://www.scribd.com/doc/226983225/2014-HDI-Desktop-Support-Practices-Salary-Report#scribd>).

¹³ For more information on flow and its effects on the workforce, see the “[A Crisis Of Attention: Technology, Productivity, And Flow](#)” Forrester report.

¹⁴ Source: “2014 HDI Desktop Support Salary & Practices Report,” Scribd, 2014 (<http://www.scribd.com/doc/226983225/2014-HDI-Desktop-Support-Practices-Salary-Report#scribd>).

¹⁵ For more on left-shifting, see the “[Master The Service Catalog Solution Landscape In 2013](#)” Forrester report.

¹⁶ Source: Susan M. Heathfield, “Training: 14 Ways to Develop Employees,” About.com (http://humanresources.about.com/od/educationgeneral/a/training_invest.htm).

¹⁷ Source: “2014 HDI Desktop Support Salary & Practices Report,” Scribd, 2014 (<http://www.scribd.com/doc/226983225/2014-HDI-Desktop-Support-Practices-Salary-Report#scribd>).

¹⁸ To learn more about how to improve your customer experience, see the “[This Isn't Your Grandfather's Service Desk](#)” Forrester report.

¹⁹ Source: James Del Monte, “IT Employer Information - Cost of Hiring / Retention (COH),” JDA Professional Services (<http://www.jdapsi.com/Client/articles/coh>).

²⁰ Source: “2014 HDI Desktop Support Salary & Practices Report,” Scribd, 2014 (<http://www.scribd.com/doc/226983225/2014-HDI-Desktop-Support-Practices-Salary-Report#scribd>).

²¹ For more information on knowledge management technologies and how to apply them to your current strategies, see the “[Knowledge Management Is A Foundation For Good Customer Support](#)” Forrester report.

²² Source: “2014 HDI Desktop Support Salary & Practices Report,” Scribd, 2014 (<http://www.scribd.com/doc/226983225/2014-HDI-Desktop-Support-Practices-Salary-Report#scribd>).

²³ Source: Forrester's Global Business Technographics® Devices And Security Workforce Survey, 2015.

²⁴ For more on how to handle the increasingly mobile workforce, see the “[Equipped To Thrive: Help Employees Turn Mobile Moments Into Customer Value](#)” Forrester report.

²⁵ More information on customer satisfaction surveying can be found in the following report. See the “[This Isn't Your Grandfather's Service Desk](#)” Forrester report.

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