Case Study: Tedder Consulting helps a Service Desk become the Service Desk

The Customer

The Service Desk at a mortgage bank, consisting of 3 full time and 1-2 contract staff. The contracted staff primarily provided support for the level 1 (or initial) call. The Service Desk provided support for approximately 250 internal employees and nearly 400 external customer financial institutions, such as banks and credit unions.

The Challenge

The Service Desk at the bank was struggling.

In its efforts to established itself as the "single point of contact" for IT issues, the Service Desk had become a "dumping ground" for IT. New services, updates, applications, and products often "appeared" without any warning, often leaving Service Desk agents to fend for themselves when trying to provide support.

As a result, Service Desk personnel were spending an inordinate amount of time trouble-shooting and chasing down resolutions in addition to trying to manage incoming calls and emails. Requests and incidents remained open for an excessive amount of time, frustrating both customers and Service Desk Agents. The Service Desk felt that it was "out of the loop", not only with its internal and external customers, but with the rest of the IT organization as well.

Further compounding the situation was the contracted Service Desk staff. While the contract resources were technically competent, on-boarding and training them regarding specific methods and routines used at the bank took way too long. Due to an internal policy limited the length of stay of contract staff, the Service Desk was continually having to on-board new contract resources seemingly just as existing contract resources had become proficient, which further increased the workload at the Service Desk.

Service Desk customers noticed the continual turnover in contract staff. As a result, some customers would insist on working with a "favorite" employee Service Desk Agent that they perceived as being more knowledgeable or providing better service.

The Journey

The bank recognized that the Service Desk was not performing as effectively as it would like. In an effort to both improve service to the end-user and reduce the workload at the Service Desk, the bank IT staff had enabled the self-service portal in a recently-implemented ITSM tool. This proved to be of minimal impact, as many of the requests and incidents captured via this portal resulted in a follow-up call from the Service Desk to further diagnose the issue or request.

The Solution

This is when Tedder Consulting became involved. As part of a larger overall ITSM improvement effort, Tedder Consulting was asked to investigate the performance challenges at the Service Desk. Tedder first analyzed the current state by interviewing customers, IT management and Service Desk personnel to gain their perspectives. Tedder also reviewed the current Service

Desk documentation and discovered that many procedures were not documented nor had performance targets and reporting been defined.

To address the challenges faced by the Service Desk, Tedder Consulting developed and implemented a three-pronged solution:

- <u>Process Design Workshops</u>. In these workshops, Tedder worked with Service Desk personnel to define what success would look like in the future state, define process and procedures, and establish performance targets and regular monthly reporting.
- <u>Service Desk Enablement.</u> Next, working with key personnel from the Service Desk and other parts of the IT organization, Tedder led the development and implementation of ITSM process improvements. These improvements included the definition of a single, intuitive categorization scheme for use with both the Incident Management and Request Fulfillment processes; establishment of a formal operational turnover procedure (which included Service Desk contact management guidance) as part of implementation of a Change, and the participation of the Service Desk manager in the regular Change Advisory Board meetings.
- <u>Training and Awareness Sessions</u>. To ensure that the improvements made at the Service Desk would be sustainable, Tedder developed and led training and awareness sessions with IT management, IT associates, and Service Desk personnel. These sessions discussed the critical contribution of the Service Desk in the delivery of valuable, effective services from the IT organization and how neither the IT organization nor the Service Desk can be successful without the other.

Results
- Onboarding new Service Desk contract resources was reduced from 6-12 weeks to 3-4 days.
- Average call resolution time decreased by 40%.
- Improved morale at the Service Desk.

Key Learnings
- Including Service Desk personnel in the development and design of the solution increased understanding and buy-in for the improvements.
- Enabling the Service Desk improved the effectiveness of other ITSM processes as well as the Service Desk.
- Good communication is critical to a successful working relationship between the Service Desk and the rest of the IT organization, and ultimately drives customer satisfaction.

Is it time for your Service Desk to truly become a Service Desk? Let Tedder Consulting help you make the transition to an engaged, enabled, and energized Service Desk. Contact Doug Tedder at doug@dougtedder.com or call +1 (317) 703-4075.