

Service Desk Recruitment Strategy

This paper seeks to outline an approach to recruiting staff for Service Desks and the various considerations that an organisation may want to consider.

It focuses on two key points;

- Recruiting the right people
- Retaining the right people

The scope of the paper covers any type of Service Desk, Service Desk or Call Centre whose work is driven by requests for help/service via phone or email.

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Getting the right people

The nature of the organisations business will dictate the sort of people required to fulfil the role of a Service Desk Operator/Technician/Agent, nevertheless there are some crucial skills and qualities that are needed to a greater or lesser degree.

One of the best means of establishing this is to prepare a matrix of critical success factors (CSF's) that assist with the recruitment of the right types of individuals.

The table on the next page illustrates the sorts of fundamental skills you'd expect any Service Desk team to possess, it is up to the organisation how high up the 'scale' (e.g. 1, 2 or 3) they wish to go when recruiting people. For example it may be very important that multi-lingual capability exists, for other organisations Technical ability may be more of a requirement due to training constraints.

Use the table on the next page to assess the sorts of people you need and how many of them at a variety of levels. The CSF's also help you formulate a 'succession plan' /

Service Desk CSF's

	1	2	3
Technical ability	Rudimentary grasp of the technical subject matter being supported.	Previous experience of the technical subject matter but requires some further training.	Very experienced level of technical skills, verging on expert. Will require minimal training.
Customer Service	Little experience of customer service but possesses a friendly and warm approach to others	Has experience of dealing with customers and managing issues they have.	Totally committed to customer service and 'going the extra mile' for customers. Has good experience of dealing with customers and handling difficult or complex situations for them.
Communication Skills	Speaks language of customer(s). Can demonstrate good verbal communication skills and basic written skills.	Demonstrates good verbal and written communications skills and can be trusted to deliver written communications to customers without support.	Possesses multi-lingual capabilities and is able to communicate effectively with customers and senior members of the business.
Team Working	Has worked with teams and demonstrates friendly and co-operative attitude.	Understands the dynamics of team work and the importance of co-operation within the Service Desk environment.	Has experience of driving teams forward and a good understanding of the methods of establishing team specialities and using tools like Belbin etc.
Innovation	Tends to deal with support issues as prescribed by training.	Has demonstrated a means of thinking laterally when dealing with unusual requests for support.	Can demonstrate an aptitude for making changes to processes or introducing new process that enables and improves the way the function operates.
Leadership	Has little or no experience of supervision of others.	Has some experience of leading small teams of people in a similar working environment.	Has extensive experience of leading teams of people, driving them forward, dealing with change and establishing good team dynamics.

Keeping the right people

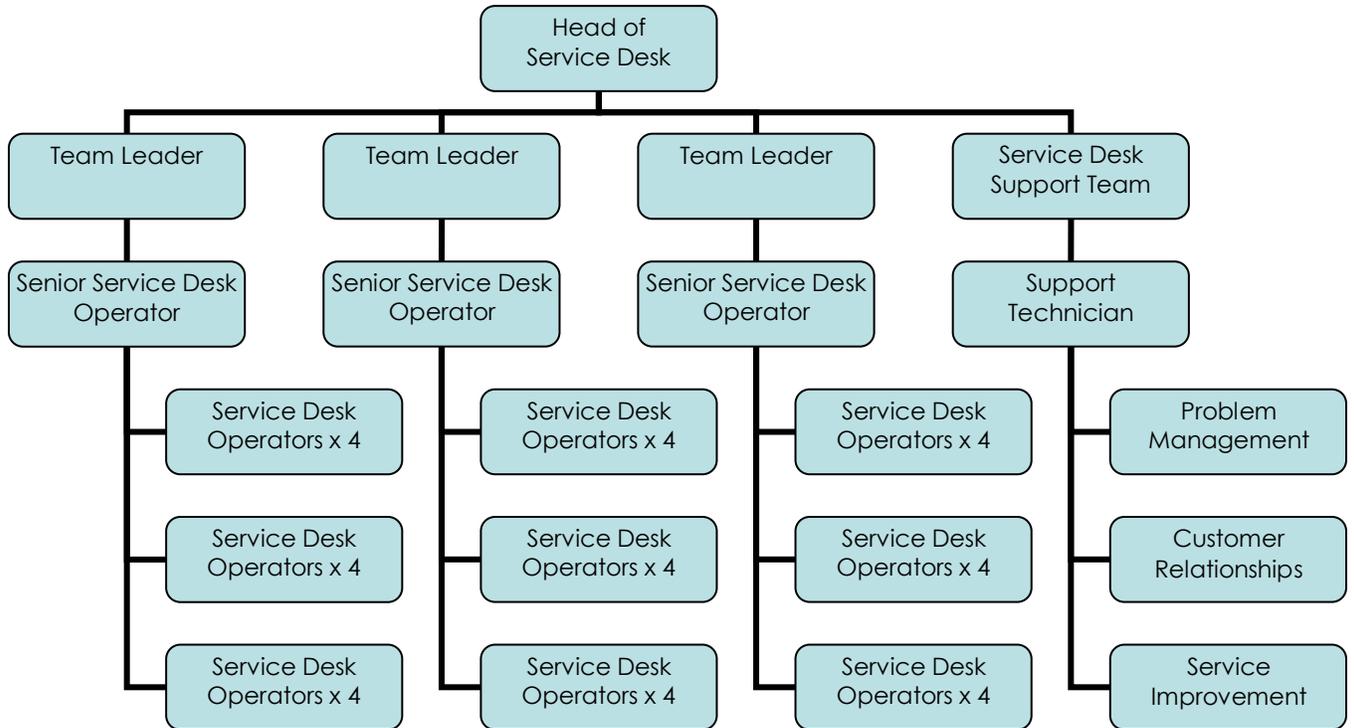
Having recruited the people you need, their remains the challenge of keeping them. The Service Desk industry can be one of high attrition, especially if the skills are in demand, but also because the job can be a challenging one.

The constant stress of dealing with customers who may be unhappy with the service being provided can be a difficult and demanding thing to cope with.

To overcome these things the list below covers the key points to consider when working on a solid retention strategy.

- Pace and quality of training.
 - Ensuring the Service Desk staff have a clear understanding of what they are expected to do, will prevent them from feeling stressed as a result of constantly experiencing situations for which they are unprepared
- Prospects for progression.
 - A clear succession plan based on the CSF's for recruitment.
 - A hierarchy design that's not too flat so that there are opportunities to make even small steps up a ladder. (see page 5)
 - Clear objectives so that people know what they need to do to make the moves.
 - Opportunities outside of the Service Desk where the skills and experienced they have gained will be well regarded.
- Tools to do the job
 - As with having the training to understand the support they need to deliver, it is crucial to give Service Desk staff the 'tools' to provide quality support and record information about the job they do.
- Culture
 - The development of a strong team culture and customer service orientated workplace will help any new recruit settle and feel comfortable, and this is likely to aid retention.
- Environment
 - A clean, well lit, airy and open work space will ensure morale can be maintained at a reasonable level. Emphasis placed on having regular breaks away from the desk is a key factor in this sort of role, and such care and attention will help with retention.

A typical well tiered Service Desk Hierarchy that can encourage clear visibility of progression is shown below.



This example allows for at least 3 levels of hierarchy below the head of the operation, as well as a '2nd level' type function which may work on longer term issues, escalations, continual service improvement, changes, service introduction, training and CRM.

The 2nd level type function can provide a place for Service Desk individuals to have a short 'sabbatical' from frontline work as well, by 'rotating' them through that part of the function for a period of time.

The individual Service Desk teams of 4 people as described above could even have an 'informal' hierarchy where people can act as mentors to new staff, or as subject matter experts.

Role Definitions

For large Service Desks one or more Supervisors or Team Leaders may be needed to handle staffing and call handling and escalation issues. Also Service Desks, who provide support during extended service hours, may have 'Shift' Leaders or Supervisors to provide management support at all times.

The number of Analysts required will depend upon the volume and nature of Incidents, the Service Desk Incident resolution rate, average call handling time and patterns of work e.g. hours of cover, shift patterns.

Whilst some of the responsibilities can be absorbed into generic roles, in larger, busy Service Desks it may be helpful to create a dedicated role(s) for the management of Incident queues and Customer communications away from the day to day responsibility of answering the phones. This could be a dedicated role for an individual(s) or could be carried out on a rotational basis across all Service Desk Analysts.

Service Desk Role

1. **Customer Interface:** receiving all calls for Customers and ensuring these are logged and dealt with, ensuring the Customer is kept up-to-date with progress and action on all Incidents and Problems being managed by the department, providing regular updates on status on service availability and Requests, communicating planned and short-term changes of service levels to Customers;
2. **Incident Management:** recording and managing the life-cycle of all Incidents that affect the service provided to IT Customers, allocating Incidents that cannot be resolved by the Service Desk to second or third line support resources and co-ordinating the response of these resources;
3. **Performance Management:** monitoring and reporting IT performance against service levels and key performance measures, providing management information, identifying areas for service improvement, escalating events that may breach (or have breached) service levels, identifying customer initiated service breaches, recording details of events that breach service levels;
4. **Service Management System:** managing the service management system, maintaining the standing and dynamic data, ensuring service levels, customer and user information, services, support resources, etc. are maintained;

5. **Service Desk Team:** managing resources to ensure the Service Desk team meets its objectives, providing guidance and assistance and meeting the development needs of the individuals (including own needs), controlling and managing expenditure related to team's activities;
6. **Problem Management:** identifying Problems that need to be referred to Problem Management, contributing to the resolution of Problems where appropriate;

Incident Co-coordinator Role

1. **Customer Interface:** deliver high-quality communications with Customers during service interruptions to their systems; focus on managing communications across Customers and IT to ensure that Incidents are dealt with by priority and Customer needs, providing regular communications to Customers across the organization, e.g. on outages etc, to maintain a positive and accurate image of IT and the Service Desk;
2. **Incident Management:** monitor logged incoming Incidents and Requests, to ensure that these are diagnosed and escalated to appropriate and consistent quality standards; co-ordinate Service Desk, IT staff and Customers to ensure accurate and appropriate communications during Incidents and Service Outages;
3. **Problem Management:** liaising with Service Desk Manager/Problem Manager to escalate Major Incidents and contribute to Problem Management reviews and process;
4. **Service Level Management:** monitor Incident queues to identify potential SLA breaches; contact relevant IT staff / support groups to highlight any key SLAs that may be breached. Liaise with Service Desk Manager/Problem Manager to review SLA performance, identifying key areas where communications and escalation can be improved.

Problem Management

This role is responsible for both reactive root-cause analysis and proactive trend analysis. It would be unusual for this to be a full-time role in smaller organizations but in a large organization there may well be a requirement for a team of Problem Managers each with responsibility for a location, business or technical area. Where the team has split responsibilities it is important that someone within the function has a more 'overall' responsibility to ensure that duplication of effort is not made for similar or identical Problems. In some smaller organizations this function could also be merged with other roles such as Availability Manager, Capacity Manager or IT Service Continuity Manager.

Only in the very smallest of organizations should it be shared with the Service Desk or across Support Groups to prevent conflicts of objectives or timescales. Typically if combined with either of these groups reactive responsibilities will always take precedence and the pro-active responsibilities of such a role will be neglected for a time when 'we are not so busy', which of course will never come.

The Problem Manager should also be a strong individual with the ability to communicate and negotiate at all levels. Good organizational skills plus the ability to motivate people across the organization to provide solutions.

Problem Management Role

1. **Customer Interface:** delivering & managing high standard communications across Customers and IT to ensure that Problems are dealt with by priority and customer needs, providing regular communications to Customers across the organization; provide a practical representation of the Customer view within IT and the Service Centre; attend Customer meetings, review SLA performance, take part in new projects and represent the Service Centre viewpoint and input;
2. **Major Incident Management:** co-ordinate with Service Desk and Incident Co-ordinator in the identification of Major Incidents; manage Major Incidents, to ensure that these are diagnosed and escalated to appropriate and consistent quality standards; co-ordinate Service Desk, IT support staff and Customers to ensure accurate and appropriate communications during Major Incidents;
3. **Post Mortem Reviews:** call and chair Post Mortem Review meetings following Major Incidents; issue a written Post Mortem report to IT management; ensure Post Mortem actions are completed in a timely manner;

4. **Problem Management:** manage Problems, to ensure that these are diagnosed, logged and escalated to appropriate and consistent quality standards; co-ordinate Service Desk, IT staff and Customers to ensure accurate and appropriate communications during Problems;
5. **Trend Analysis:** produce trends analysis of recurring Problems/Incidents - extract trends on Incident types, Customer types, key problem areas, depts., hardware types etc; hold regular meetings with IT support groups to review recurring Problems and press for final resolutions - or escalate; produce 'Escalation Reports' on recurring issues and issues not being resolved.

Appendix

Specific Role Definitions

1. Problem Manager
2. Service Desk Manager
3. Team Leader
4. Incident Manager

Problem Manager

Responsibility	KPI
Customer View	
Provide a practical representation of the Customer view within IT and the Service Centre.	
Account Management - Attend Customer meetings, review SLA performance, take part in new projects and represent the Service Centre viewpoint and input	
Represent the Service Centre to the rest of IT - day to day issues and changes	
Keep Service Centre staff updated on new projects and system changes	
Support the Service Manager in developing End-to-End IT Service Management across IT	

Problem Management	
Manage Major Problem/Incidents	
Co-ordinate with Helpdesk and Incident co-coordinator in major incidents	
Develop and Produce Reports on Service Delivery and SLA performance	
Produce trends analysis of recurring problems/incidents - extract trends on problem types, user types, key problem areas, depts., hardware types etc	
Hold regular meetings with IT groups to review recurring problems and press for final resolutions - or escalate	
Hold regular meetings within Service Centre to implement new problem and resolutions, workarounds, new procedures	
Produce an 'Escalation Report' on recurring issues and issues not being resolved	

Problem Manager (cont)

Responsibility	KPI
SLA Development & Reporting	
Support Service Manager in developing and implementing SLAs and (end-to-end) Service Level Management	
Liaise with all parties in the SLM chain to ensure that SLAs/OLAs and (3rd Party) Contracts are consistent and complementary – or that issues are escalated	
Develop suitable procedures to support the SLM process	
Service Reporting	
Support the Service Manager to Implement all reporting as required to meet Service Management needs (SLAs, service performance, Problem and Incident management, group performance, Trends/causes etc).	
Ensure that all necessary reporting is carried out as routine.	
Act as liaison to develop and implement new reporting as required.	
Develop Service Processes	
Support the Service Manager to:	
Develop the ITSM processes and update and implement as required to support new services, systems, processes and procedures - e.g. update and inform staff of any changes to procedures and use of service desk tools.	
Deliver and maintain suitable training and development for IT staff on tools, documentation, procedures and processes.	

Service Desk Manager

Responsibility	KPI
Customer Service	
<i>Deliver a high-quality fault resolution service for most Incidents and known problems</i>	
Deliver High-Quality first and Second level Support	
Deliver highest possible first and second-level resolution – most calls (90%+ to be resolved within the Service Centre)	
Deliver a high-quality call answering, logging and customer service facility	
Deliver high-quality communications with customers during service interruptions to their systems	
Provide a regular PR and communications presence to customers across the organization to maintain a positive and accurate image of IT and the Service Centre.	

Incident Management	
Ensure that all incoming Incidents and requests are logged, diagnosed and escalated to appropriate and consistent quality standards	
Provide suitable logging input to ensure accuracy of SLA and service performance reporting	
Co-ordinate Service centre, IT staff and customers to ensure accurate and appropriate communications during Incidents and Service Outages	
Liaise and work with Service Manager/Problem Manager to escalate Major Incidents and contribute to Problem Management reviews and process	

Service Level Management	
Aim to deliver quality response and fix services in line with IT Target SLAs	
Provide suitable logging input to ensure accuracy of SLA and service performance reporting	
Liaise with Service Manager/Problem Manager to review SLA performance - develop new procedures as required	

Service Desk Manager (cont)

Responsibility	KPI
Helpdesk Development	
Create a stimulating and learning working environment for Service Centre Staff	
Identify individual (broad) Skills needs for all staff to meet Service Centre Customer Service needs	
Implement suitable training and education programmes (e.g. skills transfer) to develop individuals and meet Service Centre Customer Service needs	
Develop individual KPIs for all staff to meet Service Centre Customer Service needs (quality and SLAs)	
Work with Service/Problem Manager to ensure that all relevant skills, knowledge, tools and processes are in place to meet Service Centre Customer Service Needs	
Identify a development programme to ensure that staff are able to continually develop skills and career opportunities	
Implement a regular internal communications schedule – Helpdesk meetings, updates on new systems and resolutions etc	

Team Leader
Service desk (First Level) Team Leader

Responsibility	KPI
Customer Service	
Deliver and maintain a high-quality fault logging and resolution service for most Incidents and known problems	
Deliver highest possible first-level resolution (xx/20%+ to be resolved at first level)	
Focus on call answering and first-level resolution KPIs – continuous development	
Participate in meetings and initiatives for Problem Management, SLAs and Service Development	
Incident Management	
Ensure that all incoming Incidents and requests are logged, diagnosed and escalated to appropriate and consistent quality standards	
Provide suitable logging input to ensure accuracy of SLA and service performance reporting	
Liaise and work with Service Manager/Problem Manager to escalate Major Incidents and contribute to Problem Management reviews and process	
Service Level Management	
Aim to deliver quality response and fix services in line with IT Target SLAs	
Provide suitable logging input to ensure accuracy of SLA and service performance reporting	
Liaise with Service Manager/Problem Manager to review SLA performance - develop new procedures as required	
Helpdesk Development	
Deliver Helpdesk service and manage First Level staff	
Maintain a stimulating and learning working environment for Service Centre Staff	
Identify training needs for First Level staff and liaise with Service Manager to develop suitable programmes	
Maintain a regular internal communications schedule – Helpdesk meetings, updates on new systems and resolutions etc	

Incident Manager

Responsibility	KPI
Customer Service	
Deliver high-quality communications with customers during service interruptions to their systems	
Focus on managing communications across Customers and IT to ensure that Incidents and Problems are dealt with by priority and customer needs	
Provide regular communications to customers across the organization – e.g. on outages etc – to maintain a positive and accurate image of IT and the Service Centre.	
Incident Management	
Monitor logged incoming Incidents and requests, to ensure that these are diagnosed and escalated to appropriate and consistent quality standards	
Co-ordinate Service centre, IT staff and customers to ensure accurate and appropriate communications during Incidents and Service Outages	
Liaise and work with Service Manager/Problem Manager to escalate Major Incidents and contribute to Problem Management reviews and process	
Service Level Management	
Monitor Incident queues to identify potential SLA breaches	
Contact relevant IT staff/groups to highlight any key SLAs that may be breached	
Maintain communications with customers if SLAs are /about to be missed	
Liaise with Service Manager/Problem Manager to review SLA performance. Identify key areas where communications and escalation can be improved	