



@ADAMCODEGA

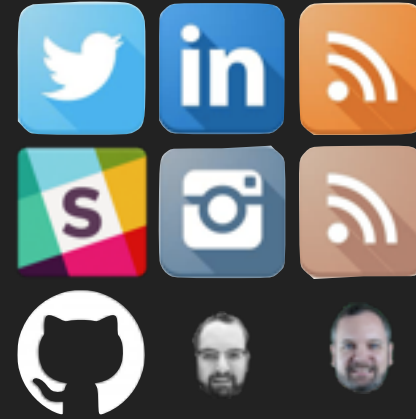
# YOU NEED A (EFFECTIVE) SERVICE DESK

Just like the flight attendant said on the flight I took here, if you do not wish to see this talk now is your chance to deplane. Take notes if it helps you remember things but don't fret, slides are already online on my GitHub. Video and PDF will also be on the conference website in a few weeks. Feel free to ask questions if they come to you but we'll have plenty of time to chat after the slides and at lunch.

YOU NEED A (EFFECTIVE) SERVICE DESK

**@ADAMCODEGA**

- ▶ IT Operations Leader at Upserve
  - ▶ SaaS startup headquartered in Providence, RI *#siliconplaza*
- ▶ In IT for almost 6 years
- ▶ Blog at [adamcodega.com](http://adamcodega.com)
- ▶ Admin of Slack at [MacAdmins.org](http://MacAdmins.org)
- ▶ Podcast manager at [podcast.MacAdmins.org](http://podcast.MacAdmins.org)



My name is Adam, I'm the IT Operations Leader for Upserve which means I'm responsible for the internal IT (computers, help desk, networks, Wi-Fi, phones and A/V) for a 140 person startup company. You can find me online in lots of places, including the [MacAdmins.org](http://MacAdmins.org) Slack team where I have not one but two emojis of my head.



I'm proud to work in Providence, Rhode Island. A small but active city with sane housing costs and a 20 minute commute to work.

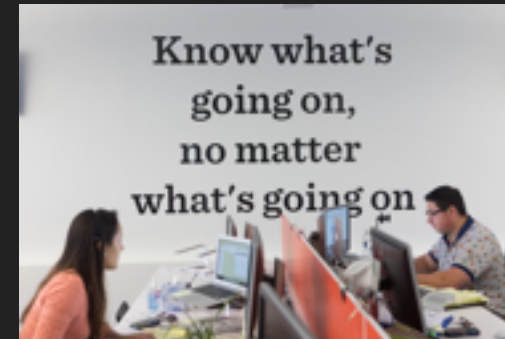


We affectionally call it Silicon Plaza

## YOU NEED A (EFFECTIVE) SERVICE DESK

**@ADAMCODEGA**

- ▶ IT Operations Leader at Upserve
- ▶ HQ in Providence, RI
- ▶ Recently acquired Breadcrumb POS from Groupon
- ▶ More offices in NYC, Chicago, and San Francisco
- ▶ 140 employees
- ▶ Manage Macs, Google for Work, routing and switching, Wi-Fi, service desk (that's why you're here!) and Salesforce



So Upserve is a growing technology company of about 140 people across three offices. I opened up two of these offices in the last 60 days when we acquired Breadcrumb POS. When people ask if I'm the only person who does IT I say I'm the only full-time person. I work together a lot with our office manager and my manager, who handles operations for the entire company.

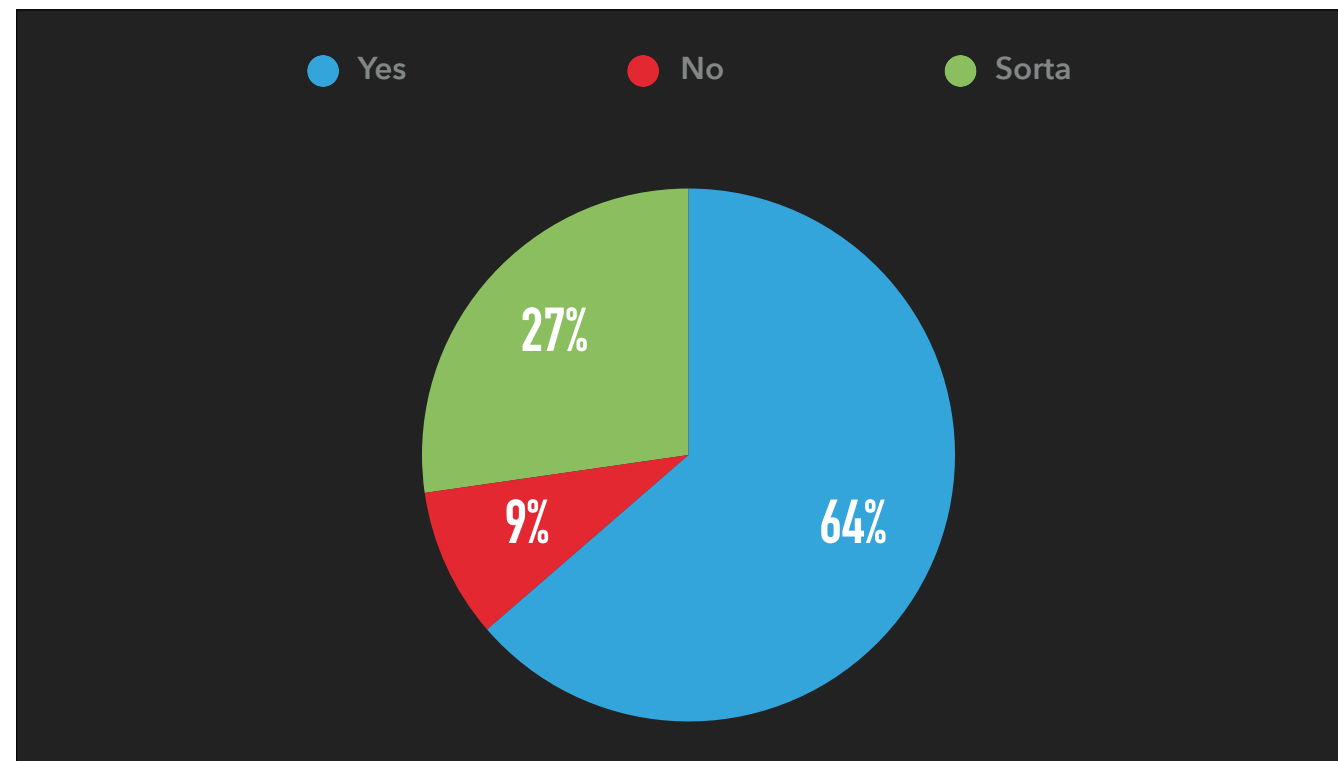
*help me...*

YOU NEED A (EFFECTIVE)  
SERVICE DESK

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**WHY**

So before we begin let's talk about why you're here.



In our pre-session survey, most of you said you're already using a service desk. Some said you aren't, and a sizable group answered "Sorta". Which I imagine means you're using ticketing but you don't feel it's effective. I'm glad you're here.

Transfer of knowledge between tiers

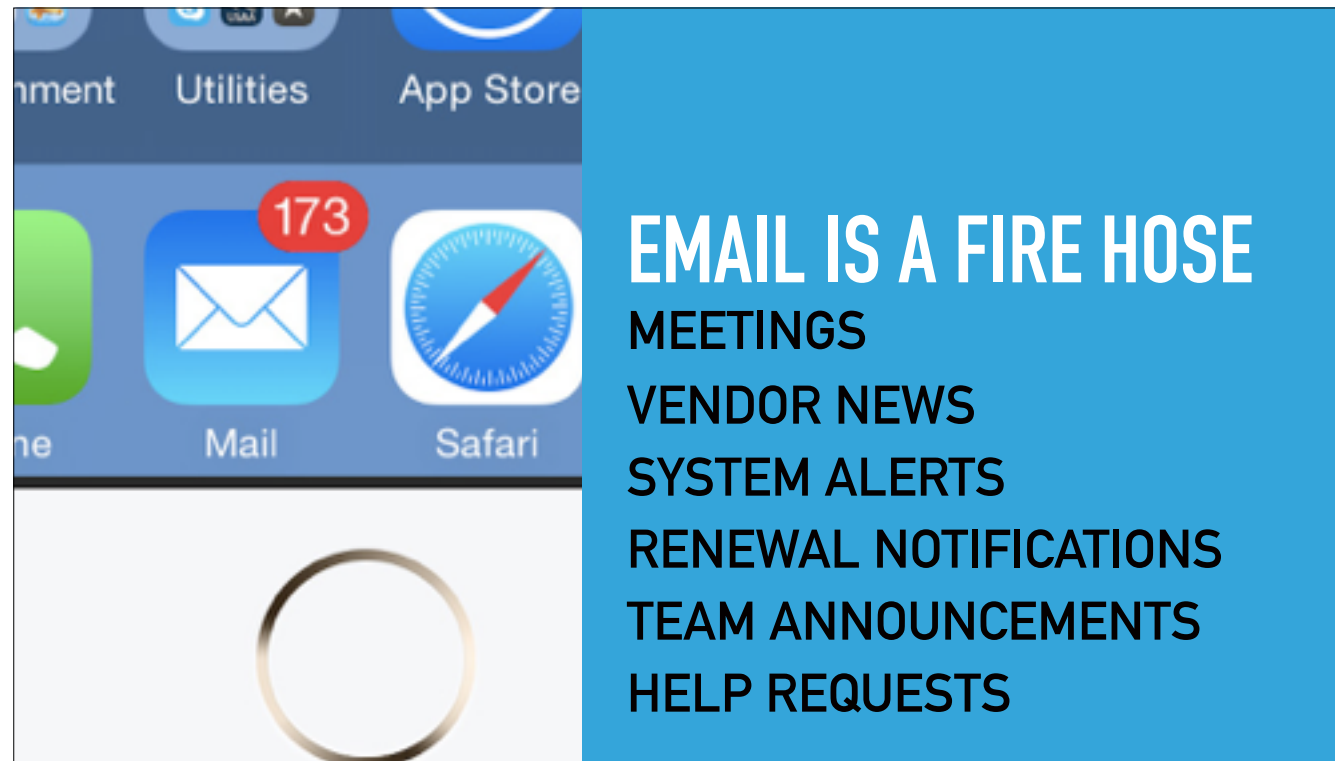
Better organize and prioritize tech request

Efficiency and best practices

Better management of tickets

We saw the same response in the comments section. You want better team work, better organization, and more efficiency.





If you aren't running a service desk, let's talk about why you should. You have a lot of email coming in during your day and your most important ones, help requests, can get lost.

YOU NEED A (EFFECTIVE) SERVICE DESK

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**WHO HELPS THE HELPER?**

YNAESD Talk Audience Member

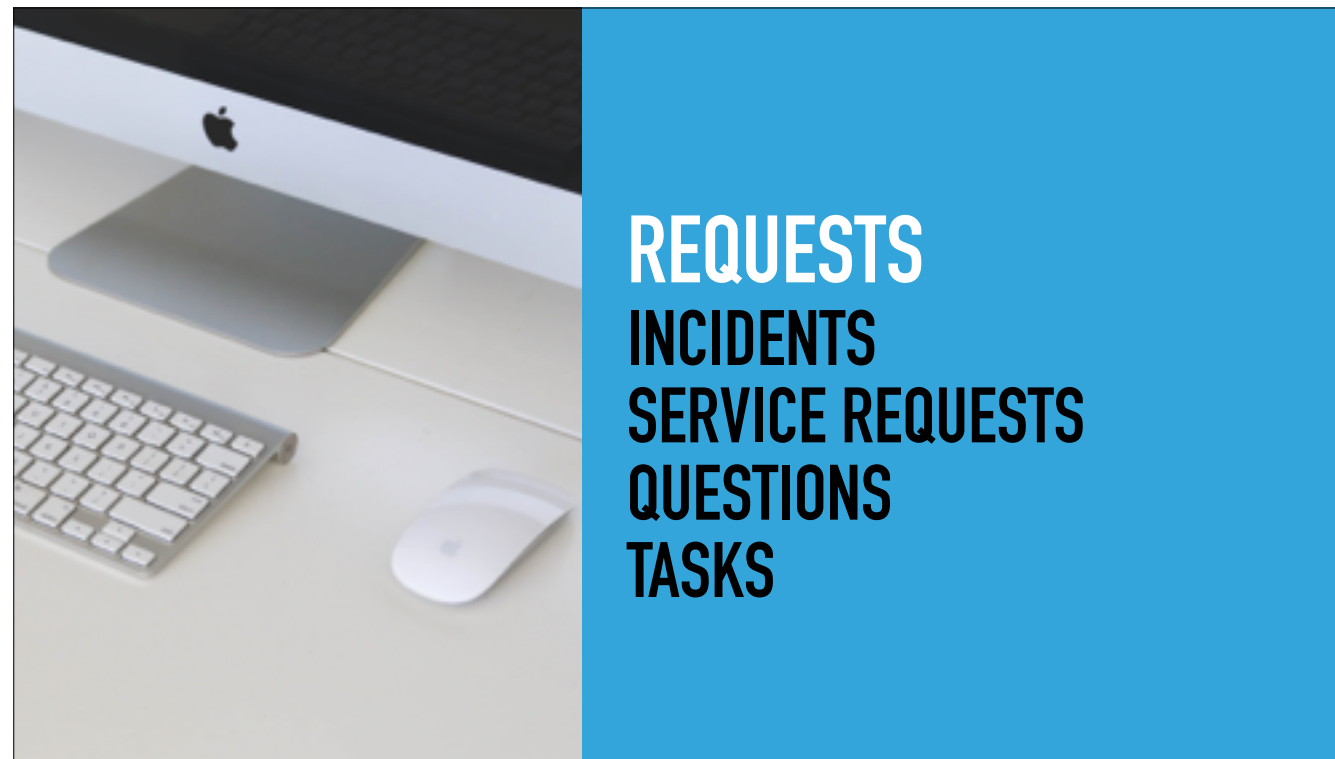
Not only that but email isn't an effective way to manage communication back and fourth with someone while also giving you usable data about the types of questions people are asking. Add a second team member into the equation and requests get lost and conversations get siloed. Would you rather ask one person for help or a team of people?



YOU NEED TO KEEP TRACK OF REQUESTS  
YOU NEED TO KEEP TRACK OF METRICS

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**YOU NEED HELP**



There's multiple types of requests you can get, these should be tracked so you can get metrics..



...which will allow you and your managers to understand what's going on in your company and where to devote resources.



Spotting trends means you're spotting pain points to be fixed. Secondly, you raise the bar for the quality of support by being transparent about how you're helping people and how quickly you're helping people.

# A SERVICE DESK

SO LETS GET STARTED..

You need a service desk, so let's get started.

YOU NEED A (EFFECTIVE) SERVICE DESK

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## ANATOMY OF A SERVICE DESK

- ▶ Ticketing
- ▶ Knowledge base/Self Service
- ▶ Reporting

There's three primary areas of your service desk...



## ANATOMY OF A SERVICE DESK

- ▶ Ticketing
  - ▶ Requester submit tickets (email and/or web form)
  - ▶ Technician reads, triages, and responds in a web dashboard
- ▶ Knowledge base/Self Service
  - ▶ Requesters can search website for information/solutions to questions
  - ▶ Requesters can install apps, run computer maintenance in Self Service app
- ▶ Reporting
  - ▶ Technicians and managers track and watch Service Desk performance via dashboards and reports

YOU NEED A (EFFECTIVE) SERVICE DESK

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## SOLUTION LANDSCAPE (AT LEAST TICKETING AND KNOWLEDGE BASE)

- |                     |                     |
|---------------------|---------------------|
| ▶ Zendesk 👍         | ▶ Schooldude 👎      |
| ▶ Freshservice 👍    | ▶ Web Help Desk     |
| ▶ Help Scout        | ▶ JIRA Service Desk |
| ▶ Desk.com 👎        | ▶ Request Tracker   |
| ▶ Web Help Desk     | ▶ Spiceworks        |
| ▶ JIRA Service Desk |                     |
| ▶ Samanage          |                     |

Cloud providers on the left, in house on the right. Be careful when picking in house, you might be delaying how fast you get a service desk up and running by having to set it up, plus maintain it. Also, be careful with platforms like Service Cloud and ServiceNow. These are development platforms for special niches, not a turn key service you can set up in a half hour.

## TICKETING: THE LIFE OF A REQUEST TICKET

- ▶ Receive
- ▶ Triage
- ▶ Solve
- ▶ Close

Let's break down the life of a ticket so we can improve the support we give and work more efficiently.

## RECEIVE

- ▶ Not just email
  - ▶ Email, Phone, Walk up, Chat, SMS, Twitter
  - ▶ Your service desk calls these "channels"
- ▶ **Receive**
  - ▶ Triage
  - ▶ Solve
  - ▶ Close

YOU NEED A (EFFECTIVE) SERVICE DESK)

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## RECEIVE

### ▶ Ticket Status

- ▶ New
- ▶ Open
- ▶ Awaiting Reply
- ▶ Waiting
- ▶ Resolved

### ▶ Receive

- ▶ Triage
- ▶ Solve
- ▶ Close

## RECEIVE

- ▶ Ticket Status

- ▶ New

- ▶ No assigned agent

- ▶ Open

- ▶ Awaiting Reply

- ▶ Waiting

- ▶ Resolved

- ▶ Receive

- ▶ Triage

- ▶ Solve

- ▶ Close

YOU NEED A (EFFECTIVE) SERVICE DESK)

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## RECEIVE

### ▶ Ticket Status

- ▶ New
- ▶ Open
  - ▶ Being worked by an agent
- ▶ Awaiting Reply
- ▶ Waiting
- ▶ Resolved

### ▶ Receive

- ▶ Triage
- ▶ Solve
- ▶ Close

## RECEIVE

### ▶ Ticket Status

- ▶ New
- ▶ Open
- ▶ Awaiting Reply
  - ▶ Waiting for requestor to comment (SLA paused)
- ▶ Waiting
- ▶ Resolved

### ▶ Receive

- ▶ Triage
- ▶ Solve
- ▶ Close



## RECEIVE

### ▶ Ticket Status

▶ New

▶ Open

▶ Awaiting Reply

▶ Waiting

▶ Not on the customer, on another dept or vendor (maybe SLA is paused)

▶ Resolved

### ▶ Receive

▶ Triage

▶ Solve

▶ Close

## TRIAGE

- ▶ Often overlooked
  - ▶ The service desk equivalent of Inbox Zero
  - ▶ Separate from working the ticket
  - ▶ Evaluate the request and
    - ▶ ask for clarifying information
    - ▶ assign a priority and agent
  - ▶ This is part of what Tier 1 should be doing
- ▶ Receive
  - ▶ **Triage**
  - ▶ Solve
  - ▶ Close

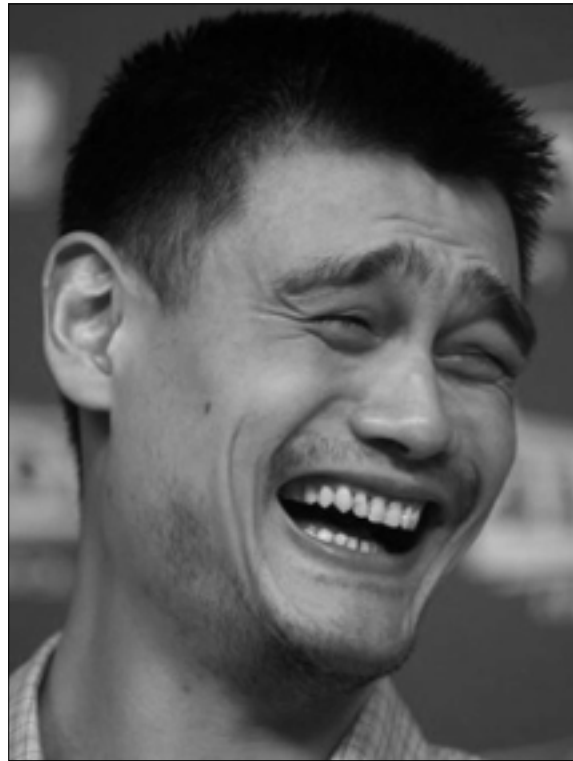
YOU NEED A (EFFECTIVE) SERVICE DESK

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## SOLVE

- ▶ Assess
- ▶ Provide Answer
- ▶ Solve ticket
- ▶ Done!
- ▶ Receive
- ▶ Triage
- ▶ **Solve**
- ▶ Close

That's all you gotta do! Right?



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**OF COURSE IT'S NOT  
THAT EASY**

YOU NEED A (EFFECTIVE) SERVICE DESK

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**MY COMPUTER KEEPS ON SAYING ITS  
STARTUP DISK IS FULL. WHAT SHOULD I DO?**

Let's look at an incoming ticket..



DUH..

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**DELETE STUFF!**

YOU NEED A (EFFECTIVE) SERVICE DESK

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**SOMEONE IN IT TOLD ME I NEEDED TO  
DELETE STUFF FROM MY COMPUTER TO  
FREE SPACE. WHAT SHOULD I DELETE?**

Awesome.. look at how you just created a second ticket with your curt response.



TOMMY TWO TICKETS

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**POSSESSES THE MAGICAL  
ABILITY TO TURN EVERY TICKET  
INTO TWO!**



## TRANSLATE THE ASK

- ▶ My computer is running out of space
  - ▶ How do I find out what's taking the most space?
  - ▶ Is there something buggy taking up space?
  - ▶ If I need to upgrade the storage who do I ask and how long does it take?
- ▶ Why am I telling you my storage is full, shouldn't you know that?
  - ▶ (Later: Evaluate types of tickets to prevent them in the first place)

It's our job to translate what the real question is, what the real issue is, and how to solve it quickly and permanently.

## SOLVE

- ▶ Provide answer
    - ▶ Set status as Awaiting Reply
      - ▶ System will remind requestor after X hours
      - ▶ Close after another X hours
  - ▶ Reply received, ticket goes back to Open, agent notified
- ▶ Receive
  - ▶ Triage
  - ▶ **Solve**
  - ▶ Close

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# THE SOLVE GOLDEN RULE

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**YOU DON'T SOLVE THE TICKET!**

You don't solve the ticket, the requestor does!

YOU NEED A (EFFECTIVE) SERVICE DESK

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**I THINK YOU'RE ALL SET. BYE!**

**LET ME KNOW IF YOU HAVE ANY QUESTIONS.**

What do you want to hear from a support person?

## MISGUIDED GOALS

- ▶ Who cares if a ticket is Awaiting Reply?
- ▶ Not in your inbox
- ▶ Not hurting SLA
- ▶ True Resolution > First Response Resolution

Why are we bothered by "Awaiting Reply"? A long time ago we created this useless metric called FRR, as if you could magically solve a ticket in only one message. How do you know if it's solved without asking the requestor?

## CLOSE

- ▶ Death and Taxes
  - ▶ ... and a closed ticket will stay closed
- ▶ Final state of being
  - ▶ Reviewable by a manager
    - ▶ Ready to be billed
  - ▶ Archived and searchable
- ▶ Receive
  - ▶ Triage
    - ▶ Solve
      - ▶ **Close**

Close is the final stage of a ticket. It's a permanent stage of being meaning the ticket is not being worked any longer and it's ready to be reviewed by a manager and maybe billed to the requesting department or customer.

## TICKETING TIPS + TRICKS

- ▶ Beginners: Keep it simple with an email address
- ▶ Use the service desk categories
  - ▶ You'll thank me later
- ▶ Write canned responses (Manually Typing < Canned Responses < KB articles)
- ▶ You (should) be able to report based on department
- ▶ Use tagging for anything else
- ▶ Consider feedback surveys



YOU NEED A (EFFECTIVE) SERVICE DESK

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## ANATOMY OF A SERVICE DESK

- ▶ Ticketing
- ▶ **Knowledge base/Self Service**
- ▶ Reporting

So now we have questions coming in and answers going out.. let's talk about more ways to get people their answers.



DO YOU EXPECT ME TO BELIEVE

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**PEOPLE WILL TRY AND  
HELP THEMSELVES?**

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**GUARANTEE NO ONE WILL READ THE KB**

You think people won't use a KB? You can guarantee no one will read your KB...

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**DON'T HAVE ONE.**

by not having one.



If you build it they will come.

## HOW TO START?

- ▶ Track the requests (Hey, the service desk will do that!)
- ▶ Identify low hanging fruit
  - ▶ Low risk, high impact
- ▶ Provide self service option
  - ▶ App Store button
  - ▶ Customized form
  - ▶ KB article

## EXAMPLES

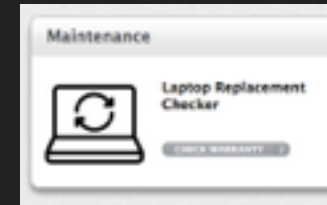
- ▶ Genuine ticket themes
  - ▶ How do I do two-sided printing?
  - ▶ Resetting NVRAM/SMC
  - ▶ Where's the rechargeable batteries?
  - ▶ What's the visitor Wi-Fi?
  - ▶ How do I get into the building after hours?

You shouldn't have an article about what to do when Wi-Fi is flaky, you should fix the Wi-Fi, but there are questions you'll hear repeated that you can answer by having information online.

YOU NEED A (EFFECTIVE) SERVICE DESK

## EXAMPLES

- ▶ Genuine ticket theme
  - ▶ When's my laptop being replaced?



<https://github.com/acodega/>

We lease our laptops so they are swapped out every two years. People often ask when they are getting a new one so we have a button in Self Service that displays your replacement date in a dialog box. The script that does this is on my GitHub



## KB TIPS + TRICKS

- ▶ Just Do It.
  - ▶ Give your team time/Get your boss to give you time to write
- ▶ Build KB articles off of canned responses
- ▶ Link to or borrow verbiage from official KB articles (ex. Apple)
  - ▶ They're job is to write KBs
- ▶ Explore + invest in screencast/KB writing software
  - ▶ Camtasia, ScreenFlow, ScreenSteps

## KB TIPS + TRICKS

- ▶ Keep an internal KB
- ▶ Expand ticket submissions with forms
  - ▶ Ordering a new computer
  - ▶ Scheduling the cafe space
  - ▶ Legal contract reviews

## ANATOMY OF A SERVICE DESK

- ▶ Ticketing
- ▶ Knowledge base/Self Service
- ▶ **Reporting**

YOU NEED A (EFFECTIVE) SERVICE DESK

## REPORTING

- ▶ Live
  - ▶ Dashboards and email alerts
- ▶ Prepared



Reporting is used to either feed a dashboard, or to make an actual report reviewed weekly or monthly. Don't be afraid of reporting. Honestly, this is what you get to make with it. (I'm Awesome, Volume One)

## YOU NEED A (EFFECTIVE) SERVICE DESK

### REPORTING

- ▶ The IPA Rule
  - ▶ Important
  - ▶ Potential Improvement
  - ▶ Authority
- ▶ Exception: "0 Days Without an Accident"



GECKOBOARD

Follow the IPA rule when deciding what to put on a dashboard. Don't be vain. Make the dashboard relevant and useful!



Leftronic is a turn key solution with a built-in Zendesk dashboard template. Some of these metrics I wouldn't display but you can change widgets very simply with no coding. Share your dashboard with your company (seriously) have it on display with the info everyone cares about.

## REPORTING

- ▶ Put on your manager hat
- ▶ Ask them what's important
- ▶ Make it easy to read
  - ▶ Less data the better
- ▶ Automate the creation



Your manager won't read your reports if it's not information he or she wants to see. Ask them, and automate the creation.

YOU HAVE AN EFFECTIVE SERVICE DESK

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**SPREAD THE WEALTH**

Now that you have an effective service desk it's time to spread the wealth..



YOU NEED A (EFFECTIVE) SERVICE DESK

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## ONE SERVICE DESK TO HELP THEM ALL

- ▶ IT
- ▶ Office
- ▶ Finance
- ▶ Legal
- ▶ Marketing
- ▶ Facilities
- ▶ One place to get help
- ▶ Ticket hand off
- ▶ One bill to pay
- ▶ One app to manage
- ▶ Shared dashboards

There's many departments in your company with the same problem you have. Get everyone on one solution and employees will have one place to ask for help.

## OTHER STUFF TO TALK ABOUT IF WE HAVE TIME

- ▶ Insist on a good mobile app
- ▶ Pick in house carefully
- ▶ Feed data into Slack
- ▶ Make a status page! ([statuspage.io](https://statuspage.io))
- ▶ Track your inventory inside your service desk
- ▶ Use your free time to write documentation

## TO DO

- ▶ Make a service desk
  - ▶ Done Is Better Than Perfect
- ▶ Fill out the feedback survey
- ▶ Ask me questions on Slack
  - ▶ You're on Slack right?
- ▶ Come back next year for YNAESD 2.0



MacAdmins.org



[bit.ly/psumac2016-50](https://bit.ly/psumac2016-50)

[github.com/acodega/YNAESD](https://github.com/acodega/YNAESD)

Slides and more content are on my GitHub. This was a 101 talk, I hope to turn it into a 201 talk next year.