



Patty

Team Assistant

“Running into a problem with IT equipment - I just want IT to take care of it.”

About Patty

If she runs into a problem with her equipment she asks the other more technically inclined project assistant first. If he is unavailable or does not know the answer she will immediately contact IT. She rarely even tries to google a solution herself.

She likes IT to come around to help her desk and uses the opportunity to ask more questions. She likes to chat with the “IT guys”.

Prefers to call IT, but will check on her open incidents in the self service. Sometimes she is filing incidents for the manger or team members that travel a lot. She also checks the status of these incidents in the self service.

Does usually not work from home but will be available on the phone afterhours if the team manager needs help urgently, for example when he is traveling and needs a flight rebooked.



Patty

Team Assistant

Goals and Motivations

- ★ Being the trusted and **reliable right hand for her manager**, taking administrative tasks off his plate.
- ★ She is an **expert in Word, filing expense reports and booking travel** and will often help other team members out with these tasks. She is proud of this expertise.
- ★ **Helping the team** out with whatever else is needed.
- ★ Knows the organisation well and **likes to share her knowledge** (e.g. by pointing team members into the right direction about where to find specific information or services “To get an ergonomic chair you have to ask Maria from facilities.”)

Frustrations and Pain Points

She is good with a few tools but not very interested in learning more about other software or how to troubleshoot any problems she is experiencing with her equipment. She depends on others / IT to help her which is sometimes frustrating (e. g. when she is waiting for a response from IT).

Context Shares an office with a project assistant.

SOFTWARE

Outlook | Word | Concur | Browser | Intranet

Main Used Applications

DEVICES



Laptop w/ monitor | Tablet | iPhone | Printer

USAGE AND SKILL



HEATone Usage (medium)



Technical Skills (low)



Deborah

Department Manager

"My purpose in this company is to make my team successful."

About Deborah

Deborah has mixed feeling about IT. She appreciates the IT staff. They are friendly and often help out fast with any issues. Recently she hired a new assistant on short notice and IT got the equipment for him ready in only 3 days even tough the official lead time is 10 days.

On the other hand when selecting an CRM tool in the past she felt that the requirements of her department were not considered enough and the implementation took too long.



Deborah

Department Manager

Goals and Motivations

- ★ Her department has to meet its **objective for the financial year**.
- ★ If she **find new methods or ways to make her team more productive** (like a new software, simplifying processes or eliminating administrative overhead) she will do everything she can to implement it.
- ★ **Enabling her** team and being appreciated for her efforts is important to her.
- ★ **Promote the work of her team** within the company.

Frustrations and Pain Points

Failing IT equipment impacts the productivity of her team. It's not acceptable to her that a team member might not be able to work for hours or days in case of a hardware failure or a malware infection.

She expects IT to keep everything secure with no impact on her or her department. She does not want to worry about sensitive customer data leaking out to the public.

IT should be more concerned about the business goals of the company in her opinion.

Context Has her own office. Spends a lot of time in meetings and 1:1 with her team

SOFTWARE

Outlook | Powerpoint | Excel | ERP system

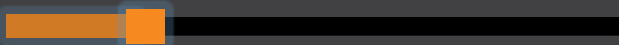
Main Used Applications

DEVICES



Laptop w/ monitor | Mobile phone

USAGE AND SKILL



HEATone Usage

(low)



Technical Skills

(low)



Alejandro

Sales Representative

"I don't have time to wait for IT ... if you give me access to what I need I can do it myself."

About Alijandro

He is tech savvy and will only contact IT after he tried to solve an issue himself. He has a few technical friends and will also ask them first before contacting IT.

His equipment at home is better than what the company provides him. He replaces his devices every 2 years. He tries out a lot of different new apps on his phone all the time.

He is a candidate for the "rogue" IT usage: he would buy and install software himself if he thinks it's useful and will save him time.

Alejandro travels a lot. On customer visits he primarily uses his tablet for demos, presentations and calculations.



Alijandro

Sales Representative

Goals and Motivations

- ★ Beat his own **sales numbers** from last year.
- ★ Make **customer presentations** and visits run smooth and professional.
- ★ Values **face to face contact** with customers, but is also on the phone a lot.
- ★ Reduce administrative overhead (like entering travel expenses) to have **more time for selling**.

Frustrations and Pain Points

He figures out a lot of his issues on his own. On the few occasions that he needs IT he expects them to respond fast. He does not want to lose a sale because of a presentation problem (e. g. with a projector) or a presentation not happening because his device is taking forever to install updates and patches.

His schedule is busy, so it's not always easy for IT to reach him. He would wish for more flexibility on how to reach him best.

He is rarely in the office and sometimes is not synced up with his team because of that.

In the past IT also occasionally contacted him to dial in via VPN or come to the office because his laptop did not get patches regularly.

Context Travels a lot, he is rarely in the office.

SOFTWARE

Outlook | Powerpoint or Keynote | Salesforce | Lync

Main Used Applications

DEVICES



Laptop | Tablet | iPhone

USAGE AND SKILLS



HEATone Usage

(medium)



Technical Skills

(med-high)



Thomas

Technician

"I don't want to do the same task a second time. Let me just automate and forget about it."

About Thomas

Tom is into tools and smart gadgets and tries new software and hardware whenever he has the chance to do so. If he discovers something useful, he will bring it up in the biweekly IT meeting.

Though he is good in optimizing his own time and work, he wishes he could automate more of the requests of the users.

In general Tom likes that his job is never boring. There are always new problems to solve. He also likes helping people and appreciates a user saying "Thank you" for his support. He will sometimes get a bit annoyed though when he gets the same requests over and over. And sometimes it's not even from different users, but the same user will ask him repeatedly for the same thing!

He started to write Knowledge articles but except for his colleagues nobody seems to find or read them.

Two years ago the company was hit by (some virus / cryptolocker) and security was suddenly a big topic for the company. As a result the IT department took measures to patch the company devices in a timely manner and Tom was tasked to make sure that the patch status is monitored and machines are up to date.

He works from home one day per week. On one day per week he goes out to users to fix problems at their desks.



Thomas Technician

Goals and Motivations

- ★ **Keep device owners productive and happy** by preventing hardware and software failures and by responding fast to incidents.
- ★ Keep endpoints secure and users protected from malware and viruses, protect company data. **Automate as much as possible.**
- ★ Improve the **customer satisfaction** for the IT department and his areas specifically. **Impress his boss** and his colleagues by finding more efficient methods for getting work done. Be seen as a nerd and technology wizard.

Frustrations and Pain Points

He hates when he has to answer and fulfill the same requests over and over. Managing his individual workload he speeds up his work with cool and nifty tools that let him automate repetitive tasks (like a bulk rename utility to get the Webex video files organized). He would like to automate answering user requests in a similar way but is unable to do so.

More and more responsibilities seem to land on his desk each week. It's a challenge to get it all done and also keep on top of latest technology. Recently he has been asked to add Virtual Machines to the portfolio of supported devices and now he tries to free up time to learn more about it.

In the past IT also occasionally contacted him to dial in via VPN or come to the office because his laptop did not get patches regularly.

Context

Email and Lync are main communication tools.

Uses remote desktop and other admin tools.

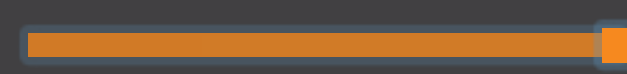
Cubicle, next to two of his colleagues who are also technicians.

DEVICES



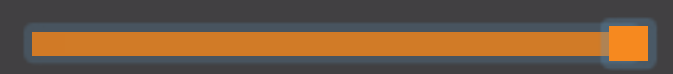
Laptop w/ 2 monitor | Tablet | Android Phone

USAGE AND SKILL



HEATone Usage

(high)



Technical Skills

(high)



Isaac

IT Manager

"I need to know what is going on in my department and HEAT One gives me a perfect overview."

About Inesh

Inesh is usually well informed about what is going on in his department. He can be asked and will know the status of each ongoing IT project at any given time, especially if the status of the project is something other than green.

He monitors how well his team is doing, watches over resolution time and SLA breaches. Customer satisfaction is a KPI not just for him but for every team member and it's a joint goal to improve it.

He also stays on top of the asset inventory, making sure the numbers are accurate which allows him to plan and manage future IT projects and cost projection more precisely.

Lately they moved some services to the cloud after much discussion with management. Though successful the migration took longer than expected and decreasing time to value for an implementation has become a new focus.

Adding more business processes to the catalog/store is an ongoing task for him and his department.



Isaac

IT Manager

Goals and Motivations

- ★ Balancing **security** needs with **productivity** needs in an optimal way. Consolidation of IT landscape (especially after mergers) Integration of systems.
- ★ Constantly showing **innovation**, be known for coming up with new creative solutions for business process implementations.
- ★ Improving **Customer Satisfaction**. It's an important KPI for his and his teams performance. Be ready for security and/or license audits.
- ★ Moving to the cloud to **reduce operational cost**.

Frustrations and Pain Points

The company grows but the IT budget stays the same, so they have to support more end users with the same means.

Some business decisions affect IT and they are often informed very late or not at all. A department might for example buy a software and later simply demand support for it.

Moving service to the cloud to reduce operational cost is an ongoing topic for him. It was a struggle to convince the company of the need for it. They had many concerns about the security of their data in the cloud.

Context Many meetings throughout the week. Has his own office.

SOFTWARE

MS Office (Excel & Outlook) | **Lync** | **Reporting Tool** | **Fin / ERP Tool**

Main Used Applications

DEVICES



Laptop | Tablet | iPhone

USAGE AND SKILL



HEATone Usage

(medium)

Technical Skills

(medium)