



# Help Desk **Simplified**

## Elements of Successful Help Desk Software

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# Elements of Successful Help Desk Software



When you're looking for **help desk software**, what is it you want the most? Cool features? The latest technology? A good price? Sure, but what matters most is happy customers. Finding *help desk software* that meets your goal of increasing customer satisfaction should be the top priority. Cloud computing has facilitated an explosion in online help desk software applications and customer service applications in addition to hosted, browser-based solutions. Many of these tools, both cloud and hosted, are very capable, but not all of them are suitable for an IT help desk environment. In this paper, we will discuss some of the most critical aspects of help desk software, particularly in regard to how those elements will help improve customer satisfaction. Considering these five important areas prior to purchase will ensure you choose help desk software which is correctly aligned to the particular needs of a help desk team and, if desired, the ITIL framework.

## Key Help Desk Software Components

### The Knowledge Base

The aim of help desk software should be to trim administration and ticket management down to a minimum investment of time, freeing up help desk technicians to deal with customers and address their needs. A Knowledge Base is a vital tool for several reasons.

- The Knowledge Base provides users with the security of an 'always-on' help system. Good help desk software should be tightly integrated with the knowledge base; ideally, technicians should be able to create, update and delete Knowledge Base entries without leaving the application. Users quickly understand that the Knowledge Base is always available and accessible, even when/if the help desk department is closed.

- User guides and documentation are vital, but they can only practically be updated once in a while – normally when a new release is scheduled. A good Knowledge Base keeps users constantly updated via a friendly, easily accessible online tool, and if kept up to date, users will begin to use it as a first port of call.
- As a result, providing a Knowledge Base can dramatically cut the amount of inquiries that reach the help desk team. Providing this extra layer of help can protect the technicians from dealing with some of the most frequently asked questions that the help desk team receive.

The result is fewer occasions where the customer has to wait on the phone, or even call the help desk. That reduces their frustration, and when they easily find answers to their questions in the knowledge base, their overall satisfaction goes up.

### **Escalation**

Help desk software normally includes a set of default escalation rules. These rules match ticket conditions to determine how certain tickets should be handled as they are raised, processed and closed.

Often, help desk software offers limited options for escalation, covering just the basics. For example, the application may automatically send reminders to team leaders or managers when a ticket goes overdue. In many cases, this isn't enough for a busy help desk team.

For efficient, timely ticket management, help desk software should allow custom escalation rules to be set. This is particularly important when the organization has SLAs and OLAs in place. Escalation engines should be able to control a range of ticket fields to ensure the help desk software can automate changes to each incident or request based on varying criteria (change in status, change in assignee, time elapsed and so on). Ideally, any emails that are sent out should be customizable, and emails should be sent multiple times if the matter not attended to (or at least the help desk software should allow this to occur). The more control the administrator has over a ticket, the less manual work is required to ensure it is processed in a timely manner.

A powerful escalation module ensures that nothing is forgotten and tickets don't "fall through the cracks". This allows for constant attention and steady feedback to the customer. Ultimately, it allows tickets to be resolved more quickly and accurately.

### **Priorities**

If you are adhering to ITIL practices, or have begun to move in that direction, then it is critical that your help desk software handle the ticket (Incident, Request or Problem) Priority in accordance with ITIL standards. Therefore, if ITIL is a concern, when using help desk software, one of the key considerations is around the Priority of a ticket and how this is calculated. In ITIL v3, the Priority of a ticket is based on two factors:

1. The Impact, which describes how critical the incident is in terms of the entire organization. Generally, this translates as how many people will be affected by the incident. Impact is recorded as a number (for example, 1 meaning low, 2 meaning medium, and 3 meaning high).
2. The Urgency, which describes how quickly a ticket should be resolved. The Impact can be taken into account when defining the urgency, and companies who have SLAs and OLAs in place will use these as key deciding factors. (Again, a number between 1 and 3 is often used.)

These two factors are multiplied in a Priority Matrix to determine the Priority of the incident.

This is a simple yet crucial part of incident management, and many basic help desk software packages don't provide for this level of detail. Using a sub-standard help desk application results in some kind of workaround or a more basic measurement of Priority. Not only is reporting compromised, but a simplistic interpretation of Priority is often problematic in IT service provision.

It's recommended that help desk software should have a Priority Matrix feature, and ideally one that can be adapted to suit the needs of the organization.

### **Asset Management**

The tracking of assets – whether they be hardware, software or even physical office equipment – gives staff the opportunity to monitor how staff use business assets (and, subsequently, where future cost savings might be made). Tracking assets within help desk software provides a wealth of data on equipment that's in use, out of warranty or under-utilized.

In terms of help desk software, asset management is a key tool that provides detailed tracking of equipment, making it easier for help desk departments to identify problematic items and baseline the items that are being used most frequently. Whenever senior management needs an asset report, this should be quick and easy to generate from the help desk software.

Asset Management also permits the retention of important documentation (such as warranties) within the helpdesk software itself. Software Asset Management (SAM) is crucial in preventing overspend and/or leaving the company liable to financial and legal penalties. It also cuts down on the time you spend trying to find crucial paperwork if an audit should be carried out.

### **Change Management**

One element of help desk software that was once reserved for service desk software is Change Management. That is no longer the case, as organizations with both service desks and help desks are focused on bringing control and order to their change process.

Managing changes in help desk software is a great way to give the entire IT department an early warning of changes that may affect them or their users. As IT systems and departments become more complex, handling change efficiently becomes more important. Change Management creates

confidence, allows Change Managers and their teams to work more efficiently and ensures the timely processing of important changes.

Help desk software should provide comprehensive Change Management tools, giving the Change Advisory Board (CAB) the ability to track, update and process the change using the same login they are accustomed to using for other ITIL functions and help desk work. Comprehensive permissions and access roles within help desk software is a way to encourage positive involvement from stakeholders and the help desk team as a whole.

The Change Management area should be visible to the help desk team so that they can provide updates to users at key stages, thus avoiding the element of surprise. Providing information is the best way to ensure acceptance of (and preparation for) important changes, and opening up the process to the team encourages participation, momentum in the department and an ongoing positive response.

Proper change management leads to fewer mistakes and fewer interruptions to your customers.

### **Customization**

When choosing help desk software, care should be taken not to opt for the 'one size fits all' solution. Customization comes in many forms in help desk software, from the look and feel of the application to the inner workings of the application itself.

The most basic (yet still very important) example is the interface the technician uses to record the details of an incident or request. Using cumbersome workarounds at the capture stage can impede the progress of a call and can become tiresome for helpdesk operators, particularly first line staff.

Additionally, the customization of escalation rules and notifications is important. The reasons for this are twofold: technicians need to be kept updated, and users should be kept informed. Customizing automatic escalation rules, and setting up necessary team and user notifications, is just one of the ways customization can be used as a productivity tool to improve workflow and customer service. Help desk software often provides users with customizable dashboards which give them a graphical, at-a-glance overview of the performance of their team or department.

Customization also encompasses some of the other features already discussed: the ability to adapt the Change Management process and assign staff to CABs on varying levels, the ability to choose which asset variables are recorded in Asset Management, the ability to change the Priority matrix and tools to adapt the Knowledge Base to include attachments, multimedia and rich formatting all make helpdesk software more powerful and capable.

## Help Desk Software Conclusion

The choices in the help desk software market are many, and it is no doubt a selection that should be made with careful consideration to your organization's needs. Select a product with too little capabilities, and you will under perform as a group and lower customer satisfaction. Select help desk software that is too complex and you will likely get bogged down in implementation and extensive training, and improper use of the product will lead to inefficiencies and unhappy customers. The above mentioned features represent a good and essential base in quality help desk software. Focusing on features with the people you support in mind will certainly lead to happy customers and a help desk with a solid and proud reputation.