

Recruit and Build the Right Team for Your Service Desk



Prepared by Daniel Wood
Head of Research
Service Desk Institute

Sponsored by

GoToManage[®]

Introduction

The most important asset your Service Desk has is the people who work on it. You could have the best processes and procedures in the world, but without the right people to deliver them, service will always be mediocre. Building the perfect team is no mean feat, as it requires balancing skills, aptitude and personalities. In such a pressured and emotive environment as the Service Desk, this balance is not easy. What are your staff looking for from their Service Desk career? How do you keep hold of your best people when the Service Desk is still seen as a stepping stone to a future IT career? This guide will explore some of the key ways in which you can recognize the right people to build or complement your Service Desk team, and show you some simple ways to keep them motivated, engaged and retain them for years to come.

Job Roles and Responsibilities

Three key job roles make up your Service Desk team.

- **Analysts**

Analysts are primarily responsible for communicating with customers and ensuring that customers are dealt with courteously and expediently. They are also responsible for alerting customers to outages or interruptions. The other major component of an Analyst's role is incident management and ensuring that incidents are logged and either solved or escalated to the appropriate party. They should also retain responsibility of the incident, and work with the Problem Manager. The final part of an Analyst's role is Service Level Management which involves monitoring contract breaches (SLAs) and to liaise with customers to alert them if they are about to break.

- **Service Desk Team Leaders**

A Team Leader's responsibilities fall into four main areas: customer service, incident management, Service Level Management, and Service Desk development. In terms of customer service they are responsible for ensuring that the fastest fixes are available and maintaining a high resolution quota. They are responsible for monitoring incidents and reviewing processes and procedures and to review SLAs and trend data over a period of time. Finally, team leaders help to manage Analysts and are committed to providing an excellent working environment and reviewing staffing levels and any problems that may arise. This would also include reviewing ITSM software and any hardware upgrades that may be required for the Service Desk to work effectively.

- **Service Desk Managers**

Service Desk Managers are responsible for the overall operations of the Service Desk including staff. It is their job to ensure that SLAs are being met and that the desk is fulfilling its business objectives. They also ensure that first and second line teams are

working effectively and are coordinated with each other. They will also be required to report on Service Desk performance and share these results with the rest of the organization. They need to review processes and procedures to ensure that the desk is working to its full capacity and optimum potential. Service Desk Managers will usually be responsible for hiring new staff.

Recruiting and Hiring the Right Candidate

The ultimate goal for anyone who is recruiting for a position is to find the ideal candidate, and here are some reasons why this is so important:

- Improved productivity
- Increased profitability
- Elevated morale
- Reduced stress (at every level of the business)
- Lower cost of operations (due to quicker start-up of the new employee, less training requirements, and fewer mistakes)
- Improved customer satisfaction
- Better delivery of service
- Possibly lower retention

These goals can only be realized through a sound and pragmatic recruitment process. There are four key steps to this:

1. Determine Staffing Levels

It may seem surprising that this is the first step, given that if you are considering recruiting new staff then you obviously feel that they are a necessary addition. However, if the need to seek new staff is created by a staff member (or members) leaving the Service Desk, or if there is a perception that the Service Desk is understaffed, then it is a good opportunity to evaluate your staffing levels.

The reason that staffing is the first step is because it is essential that staffing levels are accurate – if the desk is understaffed then you will run into numerous problems including decreasing customer satisfaction; overbearing workloads; poor service delivery; and ultimately, low morale and productivity. If staffing levels are too high then money is being spent unnecessarily and staff will be underworked leading to boredom and job fatigue.

The best way to assess your staffing levels and reach the optimum number of staff for your desk is to conduct a thorough metrics process. Metrics will reveal a number of crucial statistics that will inform you whether you are operating at optimum staffing levels. Some key metrics to assess will be call volume; average length of call; hours of support etc. These metrics can then be input into a staffing calculator or staffing model. You'll also want to look at absences (both planned and unplanned) and see how these trend over time to determine whether absenteeism is a problem and whether this is a root cause for you staffing issues.

2. Write the Perfect Job Description

To attract the ideal candidate it is vital that the job description is accurate, attractive and thorough. Get this wrong and you won't be able to attract the right candidates. You need the job description to document the vision that you have for the position – including what qualities and skills you are looking for – that will really sell the position to your top candidate.

Here are some important considerations when thinking about your job description:

- What is your organization's ethos? Is it a laid-back environment or a more formal desk that is visited by users? These considerations will help shape the job advert and, in turn, attract the right type of candidate for the position with the right personality and mentality to integrate into the team.
- What users do you support and what are the ranges of their technical knowledge? This will help determine if you require an analyst with excellent technical skills or someone with great customer service skills who does not need to possess the technical qualities. On a desk that was mainly log and refer, technical knowledge would be wasted which would make technically-minded analysts feel that they were being underutilized.
- What software and hardware do you support? Quite simply, this will inform the technical skills and experience section of the job advert as the position will require a person who has an understanding of your users' systems. An additional consideration here is that the requirements should be clarified with an acknowledgement of what level of expertise analysts need to possess. Do they require vast experience with a product or is a passing familiarity sufficient?
- Do you expect candidates to have any particular qualifications? This is self-explanatory, except that, whilst it may seem pragmatic to ask for the most popular qualifications like ITIL or Microsoft training, it may be that other qualifications or courses are equally useful. If the desk does not require a high level of technical proficiency then soft-skills may give candidates an advantage. The advice then is to not make the description too prescriptive and risk alienating potentially good candidates.

A crucial part of the job advert that many managers overlook is to convey why they would want to work for your Service Desk. What is it about the desk and the organization that makes it a good place to work? Why would analysts want to work for your Service Desk? A good starting point for these questions is to contemplate why you accepted the position with the company: what made them an attractive proposition? Analysts will want to work in an environment that is progressive and offers them the ability to learn new skills to aid their development and open up new career opportunities for them. If the Service Desk is the first step in a career in IT and customer support, then it needs to offer them a wealth of experiences and challenges so that they can improve. If you feel that your desk offers this kind of environment then make sure that it is highlighted in the job description: because the

market is so competitive these touches will make your advert stand out and attract the best candidates.

3. Filtering the Applications

Applications may have been by CV or application form (or both) but the essentials remain the same. Sifting through applications and identifying potential candidates is a time-consuming process. In addition, there are no hard and fast rules for how you should set about the task, but there are some tips that may accelerate the process:

- Ensure that knowledge or experience is supported by real life evidence.
- Look for descriptions of the work they have undertaken. For example, 'worked on a desk of 44 people' reveals more than simply stating that they worked on a large desk. 'Received a high volume of calls' is less meaningful than saying that they were dealing with 50 calls a day.
- Some employers sift through applications by looking for key words to speed up the process. While this might save time, candidates who know the process may simply insert the words that they know are being scanned for. There really is no substitute for evaluating each application individually.
- If looking at CVs, certain inferences can be drawn from the layout and design of the CV. If it is arranged neatly and methodically then this will suggest that the candidate will possess similar attributes. If the CV is disjointed and unorganized then the assumption can be made that they will treat their work in the same way. If a candidate is not prepared to invest time and effort in their application then how can you be sure that they will for your Service Desk?

4. Prepare for the Interview

Here are some tips for the interview process:

- Make a list of the skills that are essential for the position and an additional list of preferred skills. Some of the required skills for analysts might include: exceptional time-management; ability to work under pressure; customer service skills and experience; team work coupled with self-motivation and ability to work under their own volition; patience and ability to diffuse conflict; willing to learn quickly; confident and assertive telephone manner; ability to multi-task and assign priorities to work.
- Once the attributes have been determined then a list of questions needs to be created that will identify experience and demonstrations of these skills. It is useful to start with a brief yes or no question and then drill down further. For example you could start with "Have you ever dealt with a difficult customer?" then follow up by asking for further details and end with the candidate offering an evaluation of the situation and what they learned from it. Precise questions will yield informative and valuable answers. After all, it is not just experience that you are looking for at an interview but an understanding of a candidate's skills and to gain an appreciation of their personality and ability to advance in their position. If you are looking long-

term, then you want candidates who match the ethos of the company and can progress their career there.

- It is important to remember – although easy to forget in this current economic climate – that employers still need to ‘sell’ their company to candidates. It is naive to assume that your job offer will be the only one on the table, especially in a competitive industry like the Service Desk. Therefore, it is important to emphasize the inherent qualities of the company including social activities, bonuses and training and development opportunities. There is no need to embellish facts, but if the candidate is presented with a choice between a company that offers substantial benefits and a fun working environment and one that isn’t, then they will likely choose the former. To attract the best candidates then, companies must ‘sell’ their qualities and abilities.

How to Improve Retention

Retention is improving in the Service Desk industry, and this is not solely due to the current poor economic climate. Improvements in retention have been due to an ongoing investment in training and better understanding that analysts have a vital role to play after their career on the Service Desk has ended. We have also seen that incentive packages (such as health care, pensions etc.) are rated by 62 percent of ITSM professionals as good or better. With the appropriate training there is huge potential for progression into other areas of the business and we are seeing that incentives are encouraging people to stay in their positions for longer. Retention is a huge benefit as it allows you to profit from your team’s accumulation of knowledge and their experience. It is also more productive as it negates the loss in productivity that occurs when having to train a new starter. Part of this will depend on analysts identifying their own career objectives and chart their own career path.

Here are some tips that will help to improve retention:

- **Offer a wealth of training opportunities.** This includes making literature available to staff so that they can determine what courses they would like to attend. A big part of the training process is identifying training needs which can be advanced either by the analyst, managers or a combination of both. Some companies emphasize that analysts should be the masters of their own destiny – if they want to attend courses then the facility is there, but if they don’t then that is their prerogative. Management is responsible for the provision of in-house training although this can be problematic due to having critical staff away from their desks.
- **Offer a clear career path.** Analysts who believe that the company offers opportunities to them beyond the Service Desk will be much more likely to stay with the company. The Service Desk might be a stepping stone to another career, but what we are seeing is that increasingly this career is with other IT departments within the company. If analysts can see a route through which they can progress then they are much more likely to stay. One option here might be to allow analysts to spend time working for a team that they

are looking to join to gain a better appreciation of what the job entails and to see whether they are suited to the position. This is often referred to as 'shadowing' or 'buddying'.

- **Look at the simple fixes.** Improving retention on a desk is dependent on a number of factors including, but not limited to, morale, motivation, work ethic, working environment, recognition and rewards etc. There is unlikely to be one area alone which will improve retention and it is much more likely to require a concerted improvement in all of the above areas. Simple fixes might involve mentioning the names of analysts who perform well at team meetings or focus groups or allowing them input into new processes for the Service Desk.
- **Find out why employees leave by conducting an exit interview.** This will allow you to find out exactly why staff are leaving and if there are any underlying problems that need to be addressed. Exit interviews remove all of the guess work in determining why people leave and allows you to make improvements with a view to retaining your existing staff or identify what you are doing particularly well. An example of an exit interview is included at the end of this report.

Conclusion

To build the right team of people for your Service Desk you need a comprehensive and pragmatic recruitment process. People are the ultimate asset to a company, and in a customer service focused industry such as ours, this is especially true. Skilled, motivated, and productive staff are the key to a successful Service Desk and by using the right recruitment procedures you can ensure that you are able to identify and recruit them. Equally as important, although invariably overlooked, is a structured retention procedure that details a clear career path in the organization and identifies and delivers the necessary training to accomplish this progression. Even something as simple as an exit interview can help improve the retention process. Approach the exit interviews with an open mind and you can glean huge amounts of information that will help your future recruitment and retention.

It should also be noted that despite the economic difficulties of the past few years the Service Desk industry has remained remarkably resilient and demand for analysts continues to increase. Therefore, there has never been a better time to assess your recruitment and retention procedures and ensure that you are attracting, and retaining, the staff that will move your company forward.

Exit Interview Template:

Name: _____

Line Manager: _____

Department: _____

Position: _____

1.	Why are you leaving the company?	Personal reasons	Better Pay	Quality of supervision	Work environment
2.	Please explain your reason(s) for leaving in more detail.				
3.	What suggestions for improvement do you have for us?				
4.	If we implemented those suggestions, would you return to work here?			Yes	No
5.	Would you recommend this company to your friends as a good place to work?			Yes	No
	In this section, please rate the following statements:	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree
6.	I believe that I was treated like a valuable member of the company.	1	2	3	4
7.	My immediate supervisor let me know when I was doing a good job.	1	2	3	4

8.	I felt free to suggest to my supervisor changes that would improve my department.	1	2	3	4
9.	My job duties and responsibilities were clearly defined.	1	2	3	4

	In this section, please rate the following statements:	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree
10.	I received the proper training in order to perform my job effectively.	1	2	3	4
11.	Employee problems and complaints were resolved fairly and promptly in my department.	1	2	3	4
12.	If I had questions or concerns, I felt comfortable speaking with:				
	My immediate supervisor	1	2	3	4
	Upper management	1	2	3	4
	Human resources	1	2	3	4
13.	I was kept well informed about the company, its policies and procedures, and other important information.	1	2	3	4
14.	I felt that the company provided me with job security.	1	2	3	4
15.	Please rate the benefits that you received at the company (keeping in mind the benefits offered by other companies that you have worked for):				

In this section, please rate the following items:		Excellent	Good	Fair	Poor
16.	Medical	1	2	3	4
	Dental	1	2	3	4
	Vision	1	2	3	4
	Paid time off	1	2	3	4
	Pension	1	2	3	4
Please list any additional benefits that you would have wanted the company to offer:					

17.	Would you be happy to participate in a follow up interview in 6 months?
18.	Additional comments:

Interviewer Name: _____

Interviewer Signature: _____

Leaver's Signature: _____

About The Service Desk Institute (SDI)

Founded in 1988 by Howard Kendall, the Service Desk Institute (SDI) is the leading authority on service desk and IT support related issues, providing specialist information and research about the technologies, tools and trends of the industry. It is Europe's only support network for IT service desk professionals, and its 800 organization members span numerous industries.

Acting as an independent adviser, SDI captures and disseminates creative and innovative ideas for tomorrow's service desk and support operation. SDI sets the best practice standards for the IT support industry and is the conduit for delivering knowledge and career enhancing skills to the professional community, through membership, training, conferences, events and its publication SupportWorld magazine. It also offers the opportunity for international recognition of the support centre operation through its globally recognized Service Desk Certification audit programme.



About Citrix Online

Citrix Online provides secure, easy-to-use online solutions that enable people to work from anywhere with anyone: GoToAssist® and GoToManage® for remote support and IT management, GoToMeeting® for online meetings, GoToMyPC® for remote access, GoToTraining® for interactive online training and GoToWebinar® for larger web events. A division of Citrix Systems, Inc. (Nasdaq: CTXS), the company is based in Santa Barbara, California.

GoToManage®