

CREATING AN  
**EFFECTIVE**  
IT SERVICE DESK



**The IT service desk, or help desk, is the single most important point of contact between IT and the rest of the business. Looking at it logically, the service desk ensures that the organization's IT works and, in doing this, that people, business services, and business operations can all work efficiently and effectively.**



If one thinks about the evolution of the traditional IT help desk to the IT service desk (although some organizations still call their IT support hub a help desk), well-organized help desks were less common when ITIL v1, the popular framework of IT service management (ITSM) best practice, was introduced in 1989. With the advent of the PC and then the internet, software-as-a-service (SaaS), portable devices, and big data, IT support needs have evolved over time such that it's no longer enough just to have employee's IT issues logged and fixed. Instead, IT now needs to deliver an end-to-end service that ensures requests for help, information, and services are dealt with as quickly and as effectively as possible.

## So, What Makes an Effective IT Service Desk?

Let's start with a definition. The service desk is one of the four functions defined in ITIL, in addition to the 26 ITSM processes, and is defined as:

*“The single point of contact between the service provider and the users. A typical service desk manages incidents and service requests, and also handles communication with the users.”*

Source: [https://www.axelos.com/corporate/media/files/glossaries/itil\\_2011\\_glossary\\_gb-v1-0.pdf](https://www.axelos.com/corporate/media/files/glossaries/itil_2011_glossary_gb-v1-0.pdf)

Employees, who are often called “end users,” might see the service desk as “the face of IT” – because it's the most likely the primary human contact they will have with their IT organization. The service desk also plays a key role for them, as the providers of help and new services.

To the end user, the service desk is a “one stop shop” for all IT-related issues and requests. And as such, it needs to be fit for purpose. Yet so often, it's either taken for granted or dealt with as an afterthought – something that “needs to be there” rather than the corporate asset that it actually is.

This whitepaper gets back to basics to provide guidance on the key areas to focus on when creating, or improving, an IT service desk:

- People
- Process
- Product, and
- Partner perspective.

## People

Hiring people for an IT service desk can be a major challenge, but it's an important one. Without good people, even the most superior IT support processes and tools will fail to deliver high quality services, support, and most importantly, value.

Planning out a recruitment process is critical in helping to find the right people for a service desk team. Involve people from across the organization, such as human resources (HR) and business experts, and resist the temptation to use a generic job description as your real requirements might be different to other IT service desks. Plus, taking the time to ensure that all your business needs are captured will mean that nothing is missed.

You should require a good mix of interpersonal, technical, and problem-solving skills, and once you have your candidate shortlist, structure interviews such that each candidate receives a mixture of interpersonal, technical, problem-solving, and experienced-based questions. This way you can get a real feel for each candidate's strengths.

Also remember that IT support qualifications, such as the ITIL foundation certificate, aren't everything - they can provide a quick indicator of learning capability, but also ensure you balance them against problem solving and "real world" experiences. If your organization has a standard interview format, then use it as it will probably provide some extra questions, or talking points, that you might not have thought of.

Another consideration, when hiring people for your service desk, is to ensure successful candidates will be able to work, and add value within, your organization's potentially unique environment. Each organization is different, and the atmosphere at a heavily regulated office such as a financial institution or pharmaceutical company will be very different to say a charity or a tech start-up. On the one hand, a proven track record in a similar industry will be of value because the learning curve will be less steep; but, on the other, technicians and analysts who have worked in a variety of organizations will have more experience in supporting different platforms and may be more adaptable and have more ideas for potential improvements.

## Process

The IT service desk is home to two of the key ITSM customer-facing processes - incident management and (service) request fulfilment. Incident management is one of the most visible processes in the ITIL service lifecycle and its aim is to restore usual service to end users, or customers, as quickly as possible and with as little adverse impact while ensuring that nothing is lost, ignored, or forgotten about. Request fulfilment is the process that manages the lifecycle of all service requests.

The incident management is made up of the steps detailed below with monitoring, communication, ownership, and tracking carried out by the service desk throughout. The request fulfilment process is very similar to the incident management process, the biggest difference between them is that service requests are planned, whereas incidents are not!

- **Detection** - something is unavailable, has performance issues, or isn't working as expected
- **Logging and recording** - capturing all the details in an incident record
- **Categorization and prioritization** - ensuring that the incident is categorized against the correct service and has the appropriate priority set based on impact and urgency
- **Initial diagnosis** - the first attempt at resolving the incident. If the incident is resolved by the service desk at this point it is known as a first-time fix (or resolution)
- **Escalation** - there are two types of escalation:
  - ▶ Functional, where the ticket is assigned to the next level of support, e.g. from first line to second line support
  - ▶ Hierarchical, where the ticket is escalated up the management chain. This normally occurs if a complaint has been made, the service level agreement (SLA) has been breached, or sign off for additional resources is needed.
- **Investigation and further diagnosis** - looking at what has gone wrong and how to fix it
- **Resolution and recovery** - implementing the fix and restoring service
- **Closure** - ensuring the end user is able work and closing off the record with the resolution details.

When defining your processes, you will need to ensure that each action is captured and defined in a RACI (responsible, accountable, consulted, informed) chart so that it's easy to see at a glance who's responsible for each stage of the process.

Also consider how forms can be used to capture all the pertinent information. Having the right information to hand means that delays are avoided and the potential for errors are reduced. Things to consider when designing your incident and request forms include:

- Affected service
- Description
- Business impact
- Category
- Priority
- Contact details

Template your most frequently logged tickets - because every organization will need to deal with password resets, requests for new software, and email faults. By using models and templates you will save duplication and rework while making sure everything is logged consistently.

## Product

A fit-for-purpose and effective service desk or ITSM tool - the newer versions of ITIL call this “product” rather than technology - is a fundamental part of delivering incident management and request fulfilment to the rest of the organization. And, when the right tool is chosen (relative to business needs), it can deliver the following capabilities and benefits:

- A central point of capture such that nothing is lost, ignored, or forgotten about
- Better adherence to SLAs, operational level agreements (OLAs), and underpinning contracts (UCs) due to toolset monitoring and alerts
- Models and templates to ensure all incidents and service requests are handled consistently
- Major incident workflows - especially with automated communication workflows
- Better results for availability and capacity management - if incidents are logged and managed effectively, they will also be resolved more effectively meaning that downtime and performance issues are minimized
- Faster turnaround for service requests - for instance, if request fulfilment is handled centrally, then it's easier and faster to check software against available licenses and then deploy remotely
- Increased configuration management accuracy - the service desk can check and confirm asset/configuration item (CI) data when logging incidents and service requests
- Enhanced management information regarding service quality due to built-in reporting dashboards
- Increased customer satisfaction through the provision of a better, faster IT support service.

When purchasing a new service desk tool, make sure you involve your service desk and support teams. As the day-to-day users of the system, they will be best placed to advise on required features and functionality. There's nothing worse than discovering that you have missed an important requirement after you have implemented your new service desk tool, so make sure your analyst and support technicians capture all their requirements in one place so that nothing is missed. And by involving your analysts and technicians early, not only are you getting a head start on gathering requirements, but everyone involved will be invested in making sure that the new tool is a success.

When selecting a tool, the MoSCoW (must have, should have, could have, won't have (this time)) method can be used to prioritize business requirements and to ensure that the most critical requirements are understood by all stakeholders.

## Partners

Returning to the people side of things again, an IT service desk becomes more effective as more partnerships are built with other stakeholders. For instance, you will need to establish close relationships with other IT and business support teams to ensure that when incidents and service requests are escalated, they are dealt with effectively and efficiently. Work with these other internal support teams and agree how the touch points are handled.

If you don't have any OLAs in place, work with service level management to have them agreed such that all incidents and service requests are dealt with consistently and in line with any SLAs agreed with the business.

Partners can also be external to the organization - for instance, third-party technology and service providers, or user groups, professional organizations, and advisory providers. These partners might be part of day-to-day operations or just sources of best practice and advice as and when needed.

Useful standards and frameworks for your IT service desk include:

- ITIL - the aforementioned popular ITSM best practice framework. ITIL was formerly known as the IT Infrastructure Library. See <https://www.axelos.com/best-practice-solutions/itil>
- COBIT - a good-practice framework for both IT management and governance. COBIT was formerly also known as Control Objectives for Information and Related Technologies. See <http://www.isaca.org/cobit/pages/default.aspx>
- ISO/IEC 20000 - the international standard for ITSM. See [https://en.wikipedia.org/wiki/ISO/IEC\\_20000](https://en.wikipedia.org/wiki/ISO/IEC_20000)



Useful organizations for advice, resources, and templates include:

- The itSMF - a global organization that promotes ITSM best practice and provides practical advice on real life service desk implementations. It has over 50 chapters globally and is made up of 40,000 members. See <http://www.itsmfi.org/?page=ContactInformation>
- The Service Desk Institute - a community for IT service professionals. See <https://www.servicedesk institute.com/>
- HDI - formerly known as the Help Desk Institute, is a professional association for the technical support industry. See <http://www.thinkhdi.com/about.aspx>
- ISACA - which provides practical guidance, benchmarks, and other effective tools for all enterprises that use information systems; and is the owner of the COBIT framework. Like the itSMF, it has local chapters that provide help, support, and training. See <https://www.isaca.org/pages/default.aspx>
- Online resources such as [ITSM.tools](#)

## Final Takeaways

The service desk is one of IT's biggest assets as it's the central point of contact for end users and is responsible for incidents, service requests, and questions throughout their respective lifecycles. The service desk ultimately keeps the IT, and thus the business, running.

Your service desk will always be about people. You can have the best tools and fantastic processes but without the right people and partner relationships, nothing will work optimally. So, take the time to build your service desk appropriately - recruiting the right people will take time, but the effort will be worth it to hire people who will meet your requirements in the long term.

And realize that the hard work doesn't end at the recruitment phase. Once you have your team of great service desk people, you will need to work hard to keep them. So, work with the HR department to create a staff retention strategy that sets out an ongoing process of evaluation, support, training, and reward.

Your service desk processes should be slick, easy to use, and automated where possible to make life as easy as possible for everyone:

- Easy for your end users to interact with the service desk
- Easy for your service desk agents to do what they need to do.

Thus, when designing processes keep value and customer experience at the heart of everything you do to increase engagement and drive uptake.

The final part of your service desk story is your toolset. By involving your service desk and support teams, you will have a good basis for great IT support capabilities. By involving your business and designing the tool to be easy to interact with, you will deliver a great service offering that people will engage with.

Ultimately, by taking people, process, and technology considerations into your service desk design and delivery, you will create something that's not only fit for purpose but delivers real and tangible value to your business.

## About InvGate

InvGate is a provider of IT service management (ITSM) and IT Asset Management (ITAM) solutions, designed to simplify and improve the lives of IT professionals.

InvGate Service Desk helps customers to provide better IT support, offering a single point of contact for end users to report IT issues and make requests for new services. With capabilities aligned with the ITIL best practice framework, InvGate Service Desk enables your company to improve IT support efficiency, to reduce costs, and to improve the quality of service and the customer experience for end users.

If you'd like to try InvGate for yourself, then you can [start your free 30-day trial](#) today.

