

# Roadmap to Service Desk Automation

Avenues for unburying the service desk, turbo-charging user satisfaction and fulfilling your role as a strategic resource



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# Your guide to eliminating the roadblocks

Higher user expectations. Greater demand. More responsibility. But no increase in staff or money. Despite the role your service desk plays in supporting your company, it's highly unlikely your CEO is going to congratulate you with more budget because you're doing a fantastic job. More likely, staff and budget remain static while your service desk deals heroically with piles of tickets.

**And let's face it, technology isn't always a help:** In fact, technology now enables your service desk managers to do a lot of the operations department's jobs too: like patch management or installing software at customer request. And if you're not geared up to deal with that increased load, you'll find things slipping farther behind.

**Hence this roadmap and some good news:** Your current staffing, budget and infrastructure can easily deliver far more, and this guide will walk you through three proven avenues for making it happen. We'll also describe real-world success stories, all underpinned by HEAT Software's experience in working with thousands of service managers over the last 20 years — and according to best-practice strategies that we've seen proven time and again.

So let's get moving! You'll see how to cut your backlog of incidents, increase first call resolution and use automated self-service to deliver more with the resources you have now.



# Service Automation & Workflow

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# Your Opportunity

## Powering new efficiency across all avenues

The bottom line: Making life better and more satisfying for everyone — service desk agents and users — is the ultimate measure of your success. And automation is key to gaining the control you need over workflows to do so. Here's why:

**Automation eliminates redundant activities.** For example, an email with multiple recipients can be unclear about who is meant to do what. Using workflow engines to control that information flow makes assigning tasks automatic.

**It reduces time spent on routine tasks.** Want to lower service desk agents' job satisfaction? Give them the same job to do over and over again. Agents like being heroes, solving interesting problems, not automatons. So put anything repetitive in an automated workflow.

**You enjoy more repeatable and consistent decision-making.** High analyst turnover is a reality. So why make new agents reinvent the wheel? Let automation and workflow handle common issues, so agents can focus on answering more pressing employee questions.

**Unnecessary downtime is eliminated.** For example, automation can lower downtime in change and release processes. Changes can be routed through advisory boards enabling early identification of conflicts — avoiding interruptions and raising customer satisfaction.



### See how University of Oxford graduated to the benefits of automated self-service with HEAT

“Our partnership with HEAT Software will play an important role in keeping thousands of IT users operational and our IT teams happy.”

*John Ireland  
Director of Customer Services,  
University of Oxford*

# First Steps & Milestones

## Mapping the route

“Automation applied to an efficient operation will magnify the efficiency. Automation applied to an inefficient operation will magnify the inefficiency.”

– **Bill Gates**

**See where you are. Know where you’re going.** There’s no point automating an inefficient process. So look hard at what’s burying your service desk. Is it incident volume? Time to resolution? Find out. Then set clear goals based on causes — not their effects.

**Pencil, paper and whiteboard.** Before jumping into technology, meet with the constituents to note the details of specific problems. Then manually whiteboard the broader information flow and figure out what the actual processes involved are. Pick one or two high impact processes to automate first.

**Design process workflow.** Now we can design a process workflow — letting the tools take over in guiding the activities we’ve defined manually.

**Determine required integrations.** This is key. For example, remediation may be needed for Flash users who need a patch to get up to the latest version. With the right integrations in place, that can happen from within the service desk with no extra steps.

**Execute the process automation.** Set up your process workflow in your workflow engine and then publish the automated workflow to the service desk.

**Measure!** Once automation is a go, you need to measure the outcome on an on-going basis. You’ll see how close you are to your goals, and be able to refine and improve over time. First workflow working well? Repeat for the other high impact processes on your hit list.



# Arriving At The Benefits

What to expect. Plus, a real-world journey.

So you've given it your all. What's service automation giving in return? We know it's going to increase your efficiency by reducing downtime and eliminating redundant activities. But there's *more*:

**Maintenance costs fall.** Automating event tracking gives you a window into equipment availability. You'll know when machines need maintenance or replacement and can act proactively — extending equipment life and preventing customer frustration.

**You gain end-to-end visibility.** Complete visibility into service level performance is invaluable when addressing budget needs to senior management. And you'll have all the data you need to provide a clear picture of your benefits to the company.

**Improved service quality.** Employee satisfaction is the core reason for every IT department's existence. That's why keeping users happy and efficient is what service automation is all about, and why it's essential to helping your group in its role as a strategic asset.



## Change Approvals: A Real-World Journey

For one HEAT customer, change approvals were a roadblock to progress. A change advisory board working with manual-driven email processes took ages to reach consensus — until HEAT automated the workflow.

### Before Automation

- Approvals get lost in email
- No way to support approval criteria
- Serial approval process

### With Automation

- Emails can still be used, now with reminders to those that don't act
- Better approval controls. For example any deny can stop the change, or 51% approvers can approve, etc.
- Parallel approval process shortens approval timeline

# Self Service & Service Catalog

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# Your Opportunity

## Automating consumerization of the service desk

48% of users first try to help themselves.

— Gartner

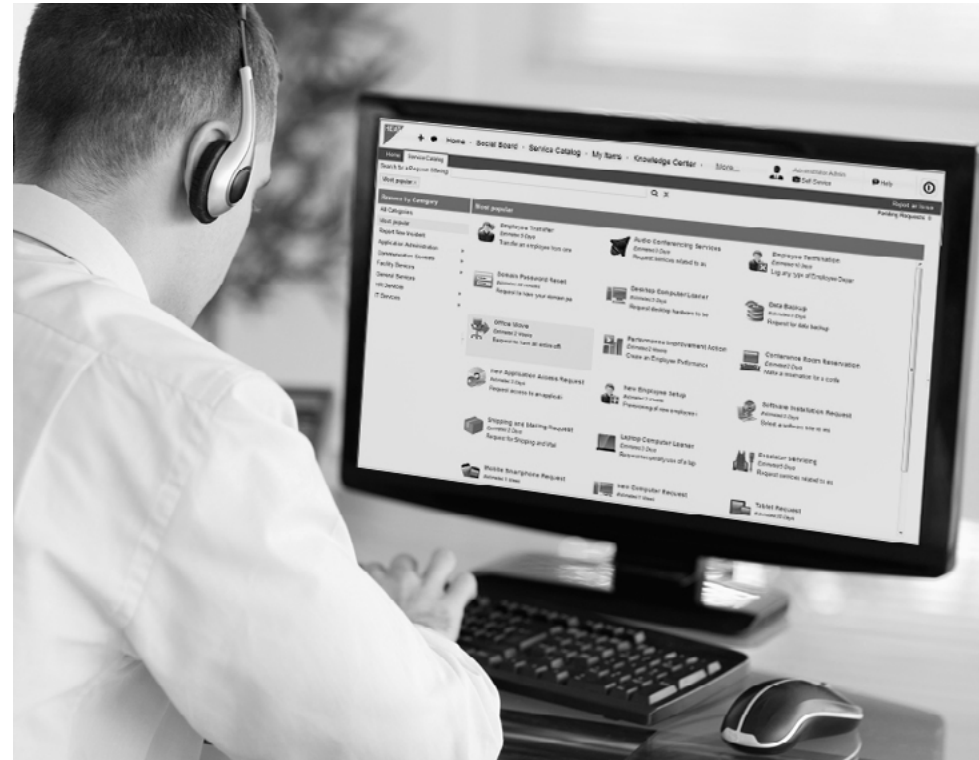
No surprise: Most people prefer to solve problems themselves — just as they prefer an ATM to waiting in line for a cashier. So here's why automated service catalogs are key to unburying your service desk:

**Self-service catalogs are users' first choice.** Give employees what they're looking for and they'll unbury your service desk for you — and as Gartner points out, most people are looking to help themselves.

**It's quicker and easier than tickets.** Rather than look at self-service as ticket intake, look at it as a faster, easier way for employees or customers to consume your services.

**Disruption to productivity is minimized.** Self-service and service catalogs get users up, running, and working productively far faster than if they have to go through the service desk.

**Increases the value of your services without adding headcount.** Service catalogs can widen your range of services to include sophisticated business requests such as employee onboarding — in addition to helping with traditional IT issues.



### See how HEAT makes service management a breeze for the County of Maui

"The more we work with HEAT, the better our IT processes become and that allows us to improve the delivery of IT services to our customers."

*Carmela Ho*  
Service Desk Supervisor,  
County of Maui

# First Steps & Milestones

## Mapping the route

Important: Recognize that an automated service catalog is a work in progress. You probably won't succeed if you try to get it all done in one go — so stage it out, bearing in mind these important steps:

**Start with your top five incident items.** Identify the issues that most commonly arrive and that have known solutions — and put them up first in your service catalog.

**Canvas your users.** Ask employees what they'd like to see and create your builds based on their replies. In other words, treat them like *customers* for whom you're creating products.

**Design services users can access themselves.** This may seem self-evident. But your biggest initial bang-for-buck will come from capabilities that customers can self-remediate.

**Leverage Knowledge Management.** Well over half of users who resolve their own issues do so with a knowledge base — so incorporate it, build on it, create knowledge articles and curate!

**Step Five: Advertise!** Go ahead: be a Madman! Users won't know about your new catalog unless you tell them. And keep thinking of ways to remind them using social media and calendars, email, etc.



# Arriving at the Benefits

What to expect. Plus, a real-world journey.

On top of everything else, service catalogs also list the benefits you bring your business, reminding senior management (think CIO) of the added value you provide. But their core benefits include:

**Shifting to proactive from reactive.** Investing the time to create a service catalog puts answers in front of users before they even think of calling the service desk.

**Measurability of SLAs.** Listing your benefits and tracking them to catalog usage enables tighter management of SLAs and tracking of external vendors, too.

**Users are more productive.** Self-service and service catalogs can enable users to get back to work much more quickly than if they try to solve issues through the service desk.

**Your service desk is more efficient.** You as a service desk will have less busy work. This gives you more time to spend on complicated issues — solving them faster and boosting user productivity.

**Higher service quality and customer satisfaction.** User self-service lowers strain on your service desk — translating into happier customers.



## Employee Onboarding: A Real-World Journey

Onboarding employees was slow and frustrating for a customer who had to manually coordinate several different teams — until the service manager established a workflow that automatically integrated the efforts of all the players.

### Before Automated Self Service

- Many separate teams needed to coordinate
- Employees began before everything was ready
- There was no measure for success

### With Automated Self Service

- All necessary details captured up front
- Costs and chargebacks automatically collected for financial analysis
- Provision cycles taken care of automatically

# Telephony Integration

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# Your Opportunity

## Extend automation and self-service to the call center

Every service desk has a voice. And integrating your phone system with your service desk will make yours sound sweeter and help unbury your service desk. Here's how:

**Phone integration and call deflection can do everything an agent can.** For example, a user calling to reset a password can be identified and authenticated via an API and talked through the reset — with alerts sent to that individual and their supervisor for security purposes.

**Important information can be delivered automatically.** Telephony integration enables the nature of a call to be identified and relevant information sent to users and agents from your knowledge base.

**Enables proactive problem management.** For example, if a router goes down, telephony integration can be used to answer the flood of callers, explain the problem, generate an incident and notify users when the issue is resolved.

**Supports higher activity while lowering costs and raising service levels.** Phone integration and call deflection lower the cost of service requests even as calls rise in number — allowing service desk managers to focus on resolving more complex issues.



**See why Total Wine is toasting HEAT-enabled ITIL processes.**

“Our users love the new HEAT system. Managers love having the information they need in easy-to-use dashboards and reports.”

*Candice Peacock  
IT Service Desk Manager,  
Total Wine*

# First Steps & Milestones

## Mapping the route

As with a service catalog, HEAT recommends that you regard phone integration as a work in progress — it just isn't set and forget. So again, stage it out — based on these critical first steps:

**Analyze your current situation.** Look at your metrics and survey your agents to get data about customer calls, frequency of issues, etc. It will be vital to optimizing your IVR system's configuration.

**Design your solution from the caller's perspective.** Rank callers' top issues, cluster similar ones together and represent them in the first menus of your phone system to ensure the shortest path to resolution.

**Keep navigation simple. Don't overwhelm users.** Limit the number of decision levels and menu options, use clear and concise language for prompts and enable users to easily get back to the main menu.

**Start your engines.** Execute with the automation engine driving the voice-driven workflow.

**Keep measuring and optimizing!** Once you're rolling, keep an eye on your metrics, identify issues, find their causes and address them. Users' needs change — and it's vital to keep up with them.



# Arriving at the Benefits

## What to expect. Plus, a real-world journey.

“We wanted to ensure a positive self-service capability and enhance the clients’ experience. HEAT improves our end-to-end service management, making us more effective in service delivery.”

– **Mark McCormack**  
**Technology Support Manager,**  
**Queensland University of Technology**

Properly configured, phone integration can handle everything an agent can — from password resets to service outages. So when incidents are solved without agents answering the calls, huge benefits accrue including:

**Big cost savings.** Automating routine issues such as password resets and software updates reduces cost per agent pricing when the number of assigned team members is adjusted accordingly.

**Higher customer satisfaction and measurability to SLAs.** Users don’t wait for a response and self-solve issues quickly — helping service desks meet SLA answer times and issue resolution speeds.

**More productive and satisfied users.** Phone integration and call deflection can enable users to get back to work faster than if they attempt to resolve issues through the service desk.

**Higher efficiency, less agent turnover.** Telephony integration reduces the stress and boredom of having to handle multiple issues with common causes — enabling agents to devote more time to more challenging issues.

**Time savings.** Phone integration can provide tips that prepare callers for what information will be needed by an agent — rather than having to search for it when the agent handles the call.



### Improving Service for 45,000 Students: A Real-World Journey

Enrolling 45,000 students a year, Queensland University of Technology’s service desk staff were stretched — until the service manager enabled users to log and close incidents over the phone using voice prompts and integrated workflow.

#### Before Automated Self Service

- Burdensome administrative processes
- Low user self-service
- Less-than-optimal service desk response
- Low request accuracy, slow turnaround times

#### With Automated Self Service

- Self-service resolutions increase 300 percent within first month
- Managing incidents significantly faster and easier
- Full-time workloads reduced to 15-minute projects
- Reduced service desk staff contacts via phone & email
- Provision cycles taken care of automatically



# HEAT: Your inside track to service desk automation

As we said, however great a job you're doing, it's unlikely that you'll be rewarded with enough budget to unbury your service desk. But the avenues we've just explored for unburying it by making better use of existing resources have been proven by HEAT across scores of service desks. And we'd like to share more with you about how Automation, Self Service and Telephony Integration — along with other proven methods — will enable you to:

- Turn the consumerization of IT services to your advantage.
- Create strategies for workflow automation that cut your backlog of tickets, increase first-call resolution and boost user satisfaction.
- Determine where to start and the steps to take when setting automation goals, applying tools and designing workflows.
- Develop, refine and improve help desk services that ensure your role as strategic service provider to your company.

So give us a call at +1 800 776 7889.

Or find out more at [heatsoftware.com](http://heatsoftware.com). And thanks for journeying with us!

"HEAT self-service enabled us to reduce our help desk head count from five agents to three and greatly improve our service levels and compliance with SLAs. It is the biggest contribution that the IT department has made to the business over the past five years"

— **Riaan van der Westhuizen**  
**IT Manager,**  
**Dis-Chem Pharmacies**

