10 Tips to Better Manage Your Service Team
ROI from Effective Service Management

- Everyone understands how service tickets are handled
- Workflow is efficient
- Service automation is in sync with your service ticket process
- Clients expect that their service tickets will be handled in a timely manner, based on business impact and severity, and expect consistent behavior from their service provider
- Ill-defined Service Ticket processes mean it takes longer to resolve Client issues and that it costs you more to resolve them!!!

**ROI from effective workflow:**
- Greater Client satisfaction
- Lower service delivery costs
Ten Things To Do

1. Define your Ticket Process
2. Utilize Different Ways to Create Tickets
3. Evaluate your Dispatch Strategy
4. Keep Resources Billable
5. Monitor Boards
6. Service Automated Workflows
7. Leverage Closed Loop Communication
8. Schedule Recurring Tickets
9. Deploy Managed Services
10. Get Engineers to Update Tickets
What do you have to offer?

- Help Desk
- Hardware Maintenance
- Backup Management
- Patch Management
- Proactive System Administration
- Vendor Management
- IP Telephony
- IT Consulting
Define Your Service Ticket Process

1. Determine your Service Types
2. Define your Service Teams
3. Design the value stream for each Service Type
4. Assign Service Boards for each team
5. Define the steps taken to resolve a ticket using Service Ticket Status
Considerations for Service Boards

- Generally, associating a service board with one team allows the team to focus on their “work-in-progress” without the distraction of other teams’ tickets.
- Roles like Dispatcher could use a separate service board or share a board with the team they direct.
- One team can be assigned to back up another on a Service Board in the event of overload.
- Assigning a team to watch more than one Service Board potentially risks missing tickets - “out-of-sight, out-of-mind”.
Service Statuses

- Does the status mean anything?
- Is it sending the right message?
- Statuses should reflect actions taken by the engineer to resolve problem or request – they inform everyone of the progress on the ticket
- Provides an accurate visibility of the ticket status to clients and management
Benefits of an Effective Process

- Establish consistency in Service Ticket handling and management
- Quickly route Service Tickets to the resource capable of resolving the request
- Minimize delay in the processing of a Service Ticket
- Understand the Service Ticket’s current status at a glance
- Effectively manage the teams responsible for providing service
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Utilize Different Ways to Create Tickets

- Alerts
- Client Emails
- Client Calls
- Customer Portal

Service Board
Client Emails

- Clients want to hand-off of their problems and KNOW they have been received
- Make it convenient and simple for your clients to get a problem, issue or request out of their world and into yours
- Acknowledge that you have it with 2-way communication
Customer Portal

- Allow clients to enter issues and problems through customer-friendly web interface
- Provide easy access to existing service tickets and status updates
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Dispatch Methodologies

- **Self Dispatch**
  - Conservative
  - Low utilization

- **Centralized Dispatch**
  - Aggressive
  - High utilization
Dispatch Best Practices

- Utilization happens one day at a time
- Schedule tomorrow, today
  - Fill tomorrow every day = Utilization
  - Schedule tomorrow’s 1st stop at the minimum
  - Set client visits for first thing in the morning
- Schedule based on skills/certifications
- Assign Help Desk Tickets for Techs returning to the office
- Utilize the Unassigned Resource
  - Last minute issues to try & address today
  - Keep visible at ALL times
- Review tomorrow’s schedule
  - Have techs acknowledged their tickets
- Make response a priority
  - Call within the hour
  - Honor clients that honor you
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Keep Resources Billable

- Morning commute = first client
- Accept new tickets
  - Enter extra tickets for the client onsite
  - No more than the schedule allows
- Finish the paperwork onsite
  - Paperwork is chargeable to client
  - Job is not done until the paperwork is done
- Call before going back to the office
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The Service Board - Your Radar Screen

- Who is monitoring your Radar Screen?
- Access to the service board must be easy
- Get it off their list and on yours
- Service must be responsive
- Service Ticket Capture
  - Client portal
  - Client emails
  - Client calls
  - MSP tool alerts
  - Recurring service tickets
- Full Service Board = WIP
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Service Automated Workflows

- Service ticket status workflows
  - Define notifications (internal and external) to be executed when a service ticket is changed to a specific status

- Service ticket escalation workflows
  - Define steps to be executed based on conditions (triggers) for a service ticket.
Service Ticket Status Workflows

- Multiple steps can be set for each service status
- Email can also include a link for customer to take a survey
Service Ticket Escalation Workflows

- One **Event** can trigger multiple **Actions**
- Actions include:
  - Change boards
  - Re-assign
  - Change status
Automated Notification to Clients

- Automated client notifications:
  - Keep client updated on status
  - Avoid both incoming and outgoing status update calls
  - Notify service level attainment
  - Improve consistency and quality of service response

- When to use automated notification:
  - Acknowledge receipt of a service ticket through non-telephonic means - upon ticket creation based on email or portal submission
  - Attainment of a Service Level milestone – response, restoration
  - Inform the client that the service ticket has been escalated
  - Inform the client that the ticket is on hold, waiting for their action
  - Survey client satisfaction with the incident or request

Client options for notification:
- Billing contact
- Primary contact
- Contact for this item

Each Service Board - Status combination can have a specific email notification template
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Make Tickets the Center of Communication

- Clients want to **KNOW** that you are working on their problem – they want to **SEE** that you are working on their problem.
Closed Loop Service

- The purpose of closed loop service is to:
  - Provide a method of continuously updating and
  - Deliver feedback to both the customer and internal personnel
Distinguish Yourself

- Managed services, remote monitoring, remote management tools are everywhere
- Constantly let your clients know that you offer these remote management solutions
- Clients want, deserve and need you to have a superior help desk function
- Get sticky with a client—have feet on the street, be in front of them and be able to offer help desk support
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Recurring Tickets

- Increase efficiency by automating repetitive tasks
- Mirror regular service tickets
  - Tasks
  - Documents
  - Finance
  - Configuration(s)
- Schedule based individual Resource
- Create standard service template for one-off tickets
  - Workstation installs
  - Server installs
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Automatically Discover Assets

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Direct Access to Manage Device
Example Dashboard: ConnectWise
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Get Engineers to Update Ticket Status

- Engineers tend to defer updating ticket status
  - Many wait until they resolved the ticket and are finalizing their notes
- Some remedies – make it easy
  - Limited the number of status selections for a ticket that follows the normal path
  - Have a clear, concise description for when to use each status
- Explain the importance of updating status
  - Management visibility of tickets that are getting “stuck” (with no status updates they all appear stuck)
  - Effective communications to the Client via portal and notifications means fewer calls requesting updates
Time Entry Best Practices

- Have a training program – first time through as new hires, then refreshers
- Provide an easy reference (aka “Job Aid”) - for when they need guidance
- Provide method for mobile status update (ConnectWise Mobile)
- Use automated workflow—identify tickets that have aged “unreasonably” without an update
- Base performance management on metrics derived from statuses – response, resolution, reopened tickets