Help Desk Management

5 Tips to Increase the Efficiency of Your Service Team

As Information Technology (IT) services and consulting companies grow, new challenges emerge in the quest to provide comprehensive and cost effective solutions to customers.

If dramatic growth happens quickly, it becomes difficult to maintain the outstanding service levels that defined the company when it was founded.

The number of clients and service tickets rapidly multiply, making it next to impossible for owners to stay on top of service team schedules or get an accurate end-to-end view of the entire business.

When a company struggles with help desk management, client satisfaction begins to decline and the business is not as profitable as it should be because there is limited visibility into how employees use their time. Nagging questions bother the company owner and team leader: What are my employees working on today? Did they get to all the places they were needed? Did they resolve tickets? Did they report on issues properly?

Don't wait for your help desk ticketing process to get out of control.

Without a defined process, it takes longer and costs more to resolve client issues.

Take charge of your service management workflow and define your ticket process from the start. By evaluating your company's current methods and strategies, you can make the necessary changes to increase the effectiveness of your service team – and ultimately your company's profitability. Here are five tips to help you get started.

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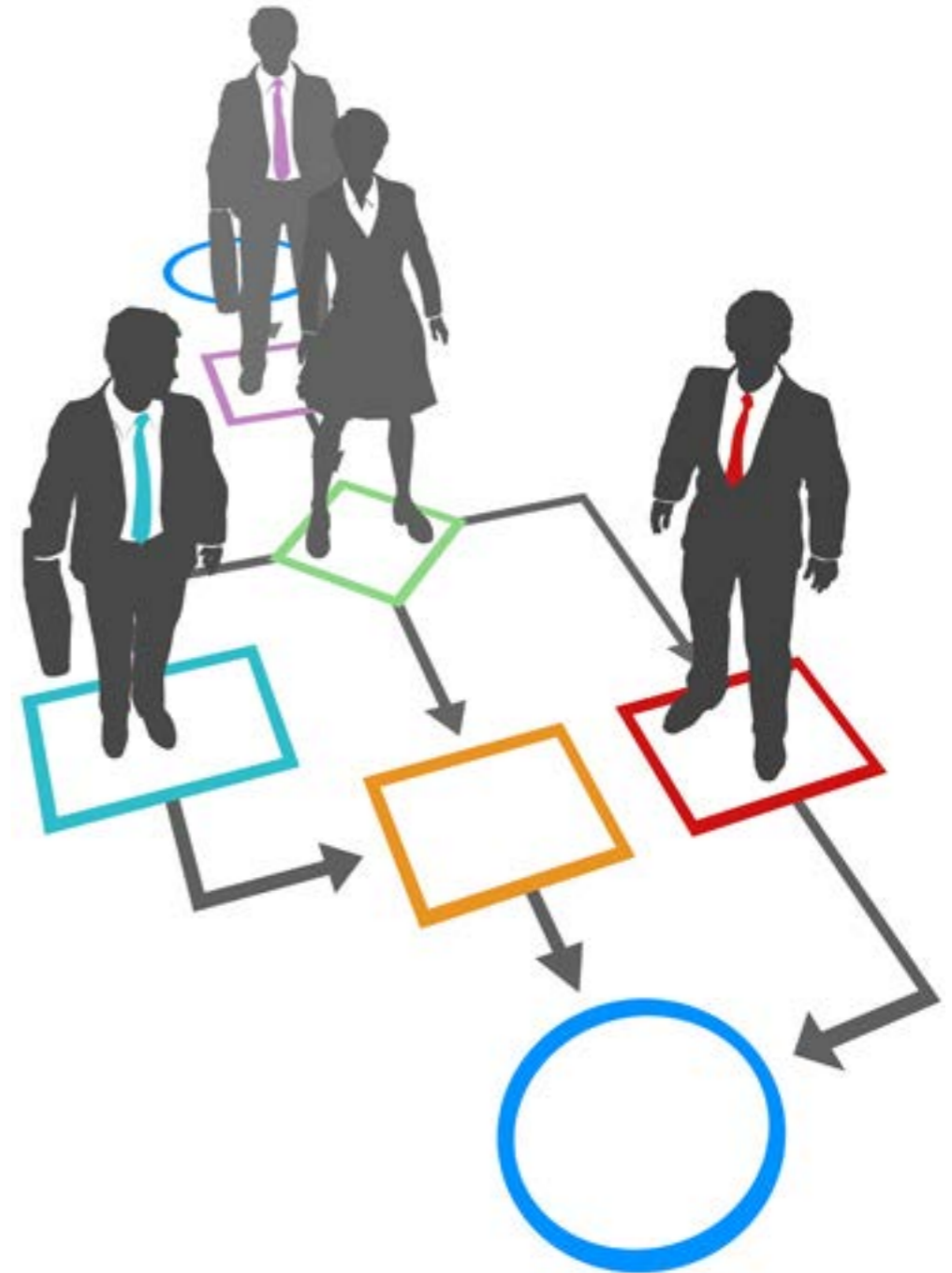
TIP 1
Define Your
Ticket Process

Have you spelled out what services you have to offer? Do your employees know what service team they belong to and who to go to if they need assistance? It may seem obvious, but many companies don't maintain an open and up-to-date exchange of information among employees and their clients. In a fast-paced environment where time and resources are limited, it is critical for everyone to know what to expect. Take time to define your ticket process to help you better manage issue resolution.

Once your service team is on the same page, you'll benefit from consistency in ticket handling and management. Tickets will be handled more quickly and efficiently because team members will know who is responsible for certain issues. Additionally, anyone can go into the system to check on the status of service tickets to ensure adequate resolution and client satisfaction.

Tip 1   Tip 2   Tip 3   Tip 4   Tip 5

TIP 2
Utilize Different Ways to Create Tickets

There are a number of ways that clients can report issues to the help desk – and let's face it; you want to show your client that you are easy to contact and always listening. When you are defining your ticket process, make sure you include different ways for tickets to be created and make it easy for your clients to communicate with you.

Enable clients to utilize phone, alerts, emails and customer portals to notify your service team of issues. Establish a process so that these communications filter into a main service board and automatically generate a response to your clients acknowledging receipt of their problem. By offering easy and convenient methods of issue and request reporting, you'll increase client satisfaction.

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TIP 3

Evaluate Your Dispatch Strategy

How do you schedule resources? Do you assign projects manually? Do you ever review and make changes? Without automation, companies must use self dispatch to assign resources to service tickets. This often results in low utilization and limited visibility. What happens if an engineer completes a ticket faster than scheduled?

Self Dispatch

With service management automation, you can take advantage of centralized dispatch and keep everything visible at all times. Schedules can be assigned based on skills and certifications. If an employee is returning to the office later in the day, a ticket can be assigned to them based on that availability. If a technician has completed a ticket early, a new one can be assigned to keep utilization high and clients satisfied.

Centralized Dispatch

Successful companies follow the practice "utilization happens one day at a time" – which means schedule tomorrow, today. With centralized dispatch, you can remain on schedule and ahead of schedule since you always know what's coming up and who is responsible for it. Have your technicians acknowledge the tickets on their schedule and make client response a priority.

TIP 4
Keep Resources Billable

Another way to keep your service team more effective is to always keep your technicians' time billable. When your technicians are at a client site, enable them to accept new tickets. Tickets can be entered into the system and worked on site. Instruct your technicians to always finish "paperwork" on site – it is billable – and the job is not done until the paperwork is done. Also make sure that technicians call before returning to the office so that you can make that resource available for new tickets.

TIP 5
Monitor Boards

Do you know who is monitoring your radar screen? In order to make your service team more effective, you need the ability to directly view service tickets and status at any time. As we mentioned previously in this eBook, visibility is important. The key to making your service team responsive is the ability to easily see new tickets, view engineer schedules, check on status and foster open communication. Without visibility, your resources may not be fully utilized and can't be held accountable for service tickets that slip through the cracks.

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BONUS TIPS

Preparing for the Cloud

As more and more applications and technologies move to the "cloud," it is more important than ever to ensure your company has best practices in place to provide exceptional customer service. The cloud presents new opportunities for companies who are considered a valued partner to their clients. Because cloud applications typically have limited customer support, you need to ensure that your service team can step in to offer personal, responsive service when needed. With effective service management and dispatching, your company remains relevant and valuable to clients.

Service Management Needs Automation

The best way to execute on these 5 tips is to implement a system that allows for the timely creation and capture of all service tickets. Using automation, tickets can be appropriately assigned and checked – all in one centralized location. Professional Services Automation software is one such solution that enables better management and accountability – and a much happier client base.

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Conclusion

Today, the market for technical services is more competitive and profit margins have been shrinking. Tight budgets and increasingly complex environments have made it more important than ever for service teams to operate as efficiently as possible in order to run the business profitably and satisfy end users.

By automating the process of capturing and dispatching tickets, you will increase the productivity of your service team. With a defined process in place to dictate how service tickets are handled, your service team becomes more efficient and clients can depend on timely and consistent response from your service desk. Your company will benefit from lower service delivery costs, greater client satisfaction and ultimately, increased profitability.

> "Without a PSA, everybody is just scheduling their own time. ConnectWise has provided the most transparent view into everyday activities for every individual in the company. I can go to the dispatch portal and know instantly where everybody is, what they're doing, what's going on, and what tickets need to be assigned. We never had that before."
>
> - Leo Reap, IT Resource

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