

HELPING the Help Desk

Outsourcing and technology are elevating customer service on IT's front line.

By Ann McClure

DEPENDING ON WHOM YOU TALK TO—AND that person may well have an agenda—the current trend in help desk service is outsourcing. However, some schools are finding that a focus on customer service skills and on using technology to improve self-service options carries the day. Here is a closer look at the major forces currently shaping the IT department's front line.

Outsourcing for Anytime Help

Outsourcing isn't always a money-saving venture. But, proponents argue, it can vastly improve help desk operations to have services available 24/7. Improving these services became an urgent need for Delgado Community College (La.) after Hurricane Katrina hit the campus in 2005. Tom Lovince, assistant vice chancellor and chief information officer, explains, "We significantly increased our online offerings to be as flexible as possible, since the students were scattered." Being short on staff exacerbated the problem, so campus leaders had engaged **Presidium Learning** by 2006 to fill the gap. Campus constituents can get help by phone, online chat, or web self-service, providing what Lovince calls a complete solution.

But for most colleges and universities, outsourcing isn't an emergency measure. Such a move can be a strategy that helps higher ed institutions manage costs, says **James Rianhard**, co-founder and managing director at **Presidium**. Arranging adequate help desk staffing can be difficult, since the number of calls coming into the help desk can fluctuate based on time of day, day of week, and point within the semester. Based on the call traffic **Presidium** handles, **Rianhard** says September and January are the busiest months and that Sunday night is the busiest time of the week.

“There have been situations where [outsourcing] reduces cost,” he says, “but it is important to realize the cost of not providing service is very high.” **Rianhard** suggests outsourcing part of the help desk, such as evening hours, and maintaining staff on campus for other times. Having first-tier support calls, such as password resets, handled either through a self-service web portal or a help desk service, can also free up on-campus staff for more critical projects.

Meeting the staffing levels required by Mohave Community College (Ariz.) students’ 24-hour lifestyles and the growth in distance learning enrollment were the driving forces behind the decision to change from the on-campus version of SunGard Higher Education’s Help Desk Services to the off-campus version, which provides 24/7 coverage. “The primary reason to outsource was to increase customer service and be more efficient, but mainly to serve our students,” explains Chuck Spotts, vice chancellor of instruction and student services. Spotts points out that with the large adult learner population at the community college, it was even more likely students would be accessing technology after the help desk had closed.

But it took some convincing, and a change in administration, to get the backing he needed. “After you run the numbers of what it takes to man a round-the-clock operation, you start to see the economies of scale to the service from SunGard,” he says. The switch increased help desk operations from 70 hours a week to more than 100—and in the first six months after the switch in July 2005, Spotts saw call volume jump by 54 percent.

As with most technology solutions, once the decision to change to an outsourced help desk is made, the real work begins. “We spend time with any new engagement understanding the systems and process [in place],” says Keith Myers, vice president of technical services at SunGard. “There is nothing more frustrating for a faculty member or student than to be talking to someone who doesn’t understand the institution.”

The service provider should be platform agnostic so its staff can help people regardless of whether the institution uses Banner, Blackboard, or Angel. The provider will also need systems access in order to be effective. Myers suggests regular conference calls and reviews as ways to keep communication lines open and ensure the provider is aware of any changes on campus to either policies or technologies.

Understanding a college or university inside and out is key. One example why: The Mohave SunGard team regularly receives inquiries about the location of bathrooms on campus.

Help Desks Not Just for IT

At DCC, Lovince says it was easy to adjust IT department processes when **Presidium** took over. It was a little trickier when administrators opted to hand off support for the student affairs department too. Arnel Cosey, provost and dean of student services, knew it would be a while before staffing levels rebounded after Katrina, yet the college still had to respond to the demands related to growing enrollment. Accreditation policies requiring

online support for online instruction combined with a general reorganization prompted the need for consistent policies and services for all campuses. In addition, state budget cuts hampered efforts to rebuild the staff. These factors all contributed to the decision to expand on the existing contract this fall.

“It wasn’t necessarily difficult. It was just time consuming,” Cosey says of the handoff. Her staff trained the **Presidium** team on both the DCC student information system and the common reasons students might call (along with appropriate solutions). She reports that less than 10 percent of calls are escalated back to her staff. By monitoring call content, her directors are able to offer solutions when topics are escalated, allowing for better frontline support.

As an example of student service improvements, Cosey explains that the college is closed for two weeks around Christmas but the prepayment deadline to hold registered classes falls on January 5. With the outsourced help desk, students can still call and find out if they need to turn in documents, even though the campus is closed.

But outsourcing non-IT calls won’t work for everyone. While Spotts says that having 24-hour support for calls inquiring about the nursing or continuing education programs is a great idea, it would be pricey. “The problem in planning is to have someone with technical abilities to answer questions on Angel Learning one minute, then nursing the next, and a light bulb the next.”

Customer Service Improvements

Although outsourcing is a trend, some schools are finding success by simply focusing on improving internal customer service offerings.

The Student Services department at National University (Calif.) launched the Student Concierge Service (SCS) in 2007 with the goal of providing the “legendary customer service” available at Ritz-Carlton hotels. When the program was first conceived, NU employees received training provided by the Ritz-Carlton Leadership Center. The SCS has since been spun out to Spectrum Pacific Learning Company, an affiliate of the university providing e-learning solutions, but the service to students is the same, officials say.

The program’s original goal was to provide one point of contact for students calling with any questions about the institution, says Kenneth Goldberg, vice president for Student Services. Students can reach the SCS staff by either phone or e-mail, and when a question can’t be answered on the spot, the staff person generates a ticket, which the team will then track to completion. An online knowledge base using software from Talisma addresses frequently asked questions to help in providing service that’s proactive. “We use major metrics and call center operations to track how we’re doing,” Goldberg says. The SCS team also looks outside of higher education to the private sector for best practices.

Learning from other industries is a good idea for institutions hoping to improve their help desks, advises Lisa Renda, president of call center provider BPA International, whose parent company is based in the United Kingdom. Employing “mystery shoppers” to test the service being provided by help desk staff is another important step colleges and universities usually forget. When looking to improve help desk services, it is important for staff members to be skilled in both the subject matter and customer service skills, she advises. “You have to deliver accurate knowledge in a credible manner.”

Self-Service Solutions

Along with efforts to improve the touch of the people answering the phones, some institutions are finding a hands-off approach can go a long way toward satisfying constituents. Through the use of online knowledge databases, which allow users to troubleshoot before opening a trouble ticket, and self-service portals, which allow people to open and track tickets online, colleges and universities are providing better service before the help desk is even called, says Paul Ille, director of technical services at Alloy Software, a provider of ticketing and asset management software.

The self-service trend can save money and free up IT staff. University of Missouri leaders selected a solution from RightAnswers when they decided to have a single knowledge base location. “We had content everywhere. It was difficult to find what you were looking for,” explains Nathan Eatherton, manager of information technology. He says the new database shaped up quickly—they were able to create their own content in addition to using the “canned content” RightAnswers provides for common software applications.

Eatherton says the knowledge base deflects common problems, so that IT staff can concentrate on more complex issues. Reporting features allow them to see which topics users are searching and to provide new or additional content to meet demand, an important aspect of keeping the database relevant. “You have to keep it current and populated. You can’t just implement it and walk away,” Eatherton cautions. “If they don’t find their answers, they won’t use it.”

Better Internal Processes

Improving ticket handling and tracking can get problems solved faster and improve user satisfaction, something the IT staff at Hodges University (Fla.) discovered after implementing IT and maintenance help desk, asset management, and facilities scheduling solutions from SchoolDude in March 2008. “We’re a small staff. We don’t need more servers or software updates,” says Wendy Gehring, director of information technology, of the decision to use a software-as-a-service (SaaS) solution.

“Before we had a help desk it was insanity,” she relates. Requests would come in by e-mail, phone, or, occasionally, the appropriate paper document. “By the time you got back to your desk you would forget half the things people asked you.” In addition to helping prioritize tasks, the new system allows Gehring to see where the staff members are

spending a majority of their time. “We spend a lot of time distributing printer toners,” she shares.

She advises choosing a system that will be easy for faculty and staff to use when filling out online requests, especially if they are accustomed to just calling IT for help.

Gehring’s staff is not tied to phones in a help desk center. They monitor e-mails on their Blackberries, which she says saves on overhead costs. However, she would prefer a solution that doesn’t require paying overtime and “my people not having a life.”

A combination of new phones from Avaya and Numara Software for ticket management has improved satisfaction on both sides of the help desk at Georgia State University. Help center manager Darlene Ward-Wright explains that the help desks at the academic colleges use the application her department put in place, which allows for better interaction, since her team can assign and transfer trouble tickets to the other locations. Because it is a SaaS solution, the Numara software did not take long to implement. “Once we got the software we were good to go,” Ward-Wright says.

Besides its large knowledge base for common IT questions, the new software allows users to open and track trouble tickets online. If there’s a problem affecting a majority of users, Ward-Wright can open a global ticket, to which people can subscribe, as well as receive e-mail updates on the status of the problem. Since the new Avaya phone units all have voicemail, the help center can also put an outgoing message on the voicemail system that people can hear, preventing multiple tickets from being opened on a campuswide problem.

“For the customer, as long as their issue is resolved they don’t care what system you use,” Ward-Wright says. “But for the internal staff it was a big deal, because it helps us support them better.”

Changing Your Institution's Help Desk

James Rianhard, co-founder of **Presidium**, offers these suggestions when considering changes to the help desk.

1. Look at the help desk from a best practices perspective.
2. Remember that any technology changes will bring in more calls to the help desk.
3. Implement multi-modal support, including phone, e-mail, live online chat, and self-help.
4. Build a strategy around the actual call center operations. Make sure you have the right people in the right place at the right time.
5. Determine which tasks should be handled internally, with a partner, or outsourced.
6. Establish service level agreements between the help desk and users. Make sure end-users know a projector not working during a lecture will take priority over an individual needing a password reset.

Resources

Alloy Software, www.alloy-software.com
Avaya, www.avaya.com
Bomgar, www.bomgar.com
BPA International, www.bpaworldwide.com
GoToAssist, www.gotoassist.com
Jenzabar, www.jenzabar.com
MicroMain Corporation, www.micromain.com
Numara Software, www.numarasoftware.com
PerceptIS, <http://perceptis.com>
Presidium Learning, www.presidiumlearning.com
RightAnswers, www.rightanswers.com
SchoolDude, www.schooldude.com
Service-now.com, www.service-now.com
Spectrum Pacific Learning Company, www.spectrumpacific.com
SunGard Higher Education, www.sungardhe.com
Talisma, www.talisma.com

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