

HDI 2018

CONFERENCE & EXPO

CONNECTING
THE
WORLD
OF SERVICE &
SUPPORT

#HDIConf

HDI 2018

CONFERENCE & EXPO

CONNECTING
THE
WORLD
OF SERVICE &
SUPPORT

Session 503: The Ten Golden Rules of Service Desk Ticketing

For Maximizing Service Delivery Value and Profit

Manuel Palachuk - Presenter

#HDIConf

HDI 2018

CONFERENCE & EXPO

CONNECTING
THE
WORLD
OF SERVICE &
SUPPORT



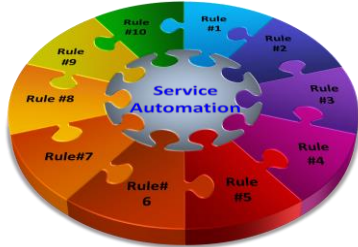
Manuel Palachuk
"International"



- Over 40 years as an Entrepreneur
- Over 40 years in Service Delivery
- Degrees in Electronics & Automation
- Expert in Process Control
- Pioneer in Managed Services
- Author of: *Getting To The Next Level - A Blueprint for Taking You and Your Business to the Top*
- Co-Author of: *The Network Migration Workbook - Zero Downtime Migration Strategies*

#HDIConf

The Ten Golden Rules Of Service Desk Ticketing For Maximizing Service Delivery Value and Profit



#HDIConf

The Tools And The ROI

- Evolution of Service Ticket & Professional Service Automation Systems
 - Your Memory
 - Notepad
 - Spreadsheet
 - SharePoint Helpdesk Site
 - Dedicated Application
- Service Delivery Profit (This is for us!)
 - Time and Material
 - Moves, Adds, Changes (Not covered under a Managed Service Agreement)
 - Projects and Project Spin-off or out of scope
- Service Delivery Value (This is for the client!)
 - Helpdesk access
 - Time and Materials
 - Maintenance of Systems
 - Other services covered under the Managed Service Agreement



#HDIConf

I Promise You...

- Revising or revamping your system will not be easy
- There may be hurt feelings and skinned knees
- You may lose a technician or engineer, or even two
- You may lose a client or two
- (Hopefully you will intentionally drop a few versus lose)
- This kind of endeavor is not for the faint of heart

You will realize all the gains mentioned earlier!
Better cash flow - Higher Customer Satisfaction
Higher Customer ROI
Higher Service Delivery Efficiency
And Higher Profits!

#HDIConf

The Power Of The Widget

Time is your widget...
It is your...

- Pizza
- Shoe
- Car
- Chocolate Bar
- Lemonade



#HDIConf

All Work Is Performed Against A Ticket Even and especially internal issues!

- You cannot prioritize what you cannot see.
- You cannot collect time (widgets) into a container that does not exist.
- You cannot share what you do not know.
- You cannot get paid for something you cannot show you have produced.
- You cannot learn from your past if you have no history.



#HDIConf

One Issue, One Ticket, No Exceptions!

- Multi-issue tickets, emails, and requests get broken out into their own tickets ASAP.
- The issues may not be either All Billable or All Covered.
- The issues most likely do not share the same Priorities, Response Times, or Deadlines.
- If the issues are related, let the ticket system manage the relationship.
- Divide and conquer means we can work parallel paths with diverse resources.
- One issue can live on to become a real catastrophe without holding up the profit and value stream.

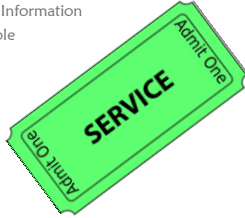


#HDIConf

The Quality Ticket Defined

The minimum requirements for a true Quality Ticket are:

- A good clear description of the Problem
 - The correct and verified Contact Information
 - The associated Device, if applicable
 - The right Service Agreement
 - The proper Priority
 - The correct Status
 - Estimate of Hours
 - If required, the Deadline
- That's the minimum -



#HDIConf

Everything We Can Do Remotely, We Will Do Remotely

- This is the key to higher productivity and efficiency in the bulk of our work product.
- This is the key to a dynamically expanding and contracting workforce.
- This is the key to our ability to outsource everything that is not our core competency.



#HDIConf

We Always Work and Track Time in Real-Time

- No time gaps or overlaps, from the beginning of the day to the end of the day.
- No duplicate entries.
- All time entries and notes are up-to-date before moving on to the next ticket.
- All team member timecards and ticket entries are complete at the end of every day.
- Proper agreement selected for each time entry.
- Proper settings for Billable, Not Billable, NC, or whatever level the techs or engineers are authorized to access.
- Quality notes to support everything from the Service Delivery Profit to the Client Value.



#HDIConf

All Tickets Must Have An Up-To-Date Time Estimate

- If the time estimate is updated (touched), there must be an internal note. Example -
NOTE: Time estimate updated by Guy Tech due to incorrect diagnosis of issue.
- We can only begin to understand or estimate our work backlog or capability after this is mastered.
- Capturing work and time budgeting data allows us to use it in quoting future projects.



#HDIConf

All Unresolved Tickets End With A WITNS

- What Is The Next Step?
- It must be a full, grammatically correct, and complete sentence that the client and the service coordinator can both clearly understand, if possible.
- It must be the last entry after the tech notes or the summary of the most recent tech note entry.
 - The client sees this.
- There can be a WITNS that is for internal use only.
 - The client does not see this.



Example: Call client to get window of time for the Microsoft Office software install.

#HDIConf

We Always Work Tickets In A Set, Defined & Logical Order

We will work tickets:

- That have been scheduled (i.e. now, next, right in front of us)
- Closest to breaking Service Level Agreement ⇨ Farthest from breaking Service Level Agreement
- High Priority ⇨ Lowest Priority
- Oldest ⇨ Newest
- We do not work on a ticket unless we can actually help move it forward.
 - Time budget, Skill level required, etc.
- Rule number one of Service Delivery still prevails:
 - Just take care of the client.



#HDIConf

All Work Is Scheduled Three Days Out

- This is the most powerful natural control valve for your service delivery system.
- It is one of the keys to grouping of work by: company, location, technician, etc.
- Real "Emergency" Moves – Adds – Changes are actually very rare or even legitimate.
- "Short Notice" issues are few.
- The parts that took three days to get here have an ETA, and that is what should trigger the scheduling for the ticket.
- This is an opportunity to highlight your
- "Out of Band" service pricing, where applicable.



#HDIConf

We Always Have Quality Communications

- Standards of communications should be built into everything we do and all the processes we build.
- All communications are closed loop, i.e. I got that. Thanks. Cool. GIWAAR – Got It, Will Assimilate And Respond
- The higher the Priority of a ticket or issue, the wider and deeper the scope of who we communicate with and to.
- Even when there is nothing to report, we will report (keep alive ping).
- Communications is like anesthesia to the client.



"The Quality of your communication is in the response."

#HDIConf

Do Not Give The Customer False Hope

- NEVER underestimate the potential for an Issue to become a Problem.
- Do not over-promise the resolution time or deadline.
- If you have already over-promised anything...
 - Don't do it again!
- Your reputation AND the reputation of the company is at stake.
- This is also one of the Ten Golden Rules of Service Delivery!



#HDIConf

The Ten Golden Rules of Service Desk Ticketing



#HDIConf

Steps To Success

- Step 1 – First You Must Believe it is Possible (Acceptance)
- Step 2 – Document all of the Key Processes
- Step 3 – Set the New Rules for your Service Ticket System
- Step 4 – Assign a Taskmaster and Get Everyone On Board
- Step 5 – Set the Deadline Beyond Which There Will Be
- Zero Tolerance -

Continuous
Incremental
Improvement

#HDIConf

Getting Everyone On Board

- 1) Be flexible wherever ethically possible. Do no harm!
- 2) Be open and receptive to the new changes.
- 3) Be a champion of the new methods the company adopts.
- We create our own success -
- 4) Participate, encourage, and engage in open dialogue.
- 5) Provide useful, positive input without reserve.
- 6) Throw Darts not Rocks.
- 7) As we implement things, we know we must stop doing one thing to be able to start doing another.
- 8) Do not settle for mediocrity!
- 9) You must be able to call anyone on anything.
- 10) Don't take it personally.
It's not about you!



#HDIConf

Questions?

#HDIConf

Thank You For Your Participation!

If you would like to receive
thirty days of
Getting To The Next Level
motivational email messages,
please visit:

<https://ManuelPalachuk.com/Motivation>



Email: Manuel@Palachuk.com
Web: ManuelPalachuk.com

#HDIConf

**Thank you for attending
this session.**

Please complete the session evaluation form
www.HDIConference.com/Eval or on the **App**.

#HDIConf
