knowledge17

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Stop HELPING and Start SERVICING Your Employees! A Story of IT Helpdesk Transformation

JIM MAZA
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Agenda

- Background and challenges
- What's in a name?
- Defining the future state
- Team development and transformation
- Phases of evolution
- Results

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Speaker Introduction



NAME: Jim Maza

TITLE: Vice President

FUNCTION: Information Technology

COMPANY: Assurance

EXPERIENCE: 25 years - has held various CIO, Vice President and Director level technology leadership roles in healthcare, software, consulting, higher education and industrial service industries

EXPERTISE: Support Services, Infrastructure, Security, Cloud Transformations – PMP, CISSP, ITIL-Certified

ACHIEVEMENTS: Implemented ServiceNow Express in Summer 2016 and has transformed unresponsive helpdesk to highly functional customer centric business service

Current Projects: Driving process efficiencies, building out knowledge base, trend analysis, training

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About Assurance

NAME: Assurance

INDUSTRY: Insurance

MARKET FOCUS: One of the largest and most awarded independent insurance brokerages in the U.S.

COMPANY'S PRIMARY PRODUCTS/SOLUTIONS: Assurance creates value by minimizing risk and maximizing health for over 6,000 businesses and individuals across the country through a suite of insurance solutions including business insurance, employee benefits, financial services, private insurance and surety

COMPANY-WIDE INITIATIVES: Cyber security, collaboration technology, geographic expansion

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Session Overview



Objectives

- Transformation of a traditional ‘Helpdesk’ to an ‘IT service desk’
- Create a high quality internal IT service department delivering smart and reliable solutions, while delivering a continuous positive technology experience



What You Will Learn

- Changing end user behaviors and culture
- Staff motivation and measurement
- Defining Service Level standards

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Context – Setting the Stage

- Company Size
  - 450 Employees
  - 100 Million in Revenue
  - Steady year over year growth
- Technology History
  - Size of organization is nearing inflection point
  - IT was primary a utility resource
  - Little process, frameworks or strategic direction
- Time for Transformation
  - Organization recognized need for senior leadership in technology to establish a center of excellence and alignment with business
  - Joined in the Spring of 2016
  - Embarked on strategic roadmap, assessment, customer service benchmarking

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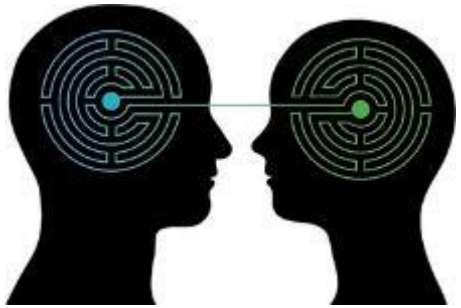
Challenges and Goals

- Challenge
  - IT Helpdesk didn’t provide much help
  - Employees went to their “favorite” IT person
  - No process, tracking or measurement
  - Tickets were simply a shared IT HELPDESK email inbox

- Goals
  - Establish a uniform support experience for our employees
  - Create a consistent training and service platform for IT staff
  - Shift culture from the favorite tech to centralized access for support and service
  - Establish metrics to ensure positive experience

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Implementation of These Five Principles



Empathy



Respect



Technical Skills



Compassion

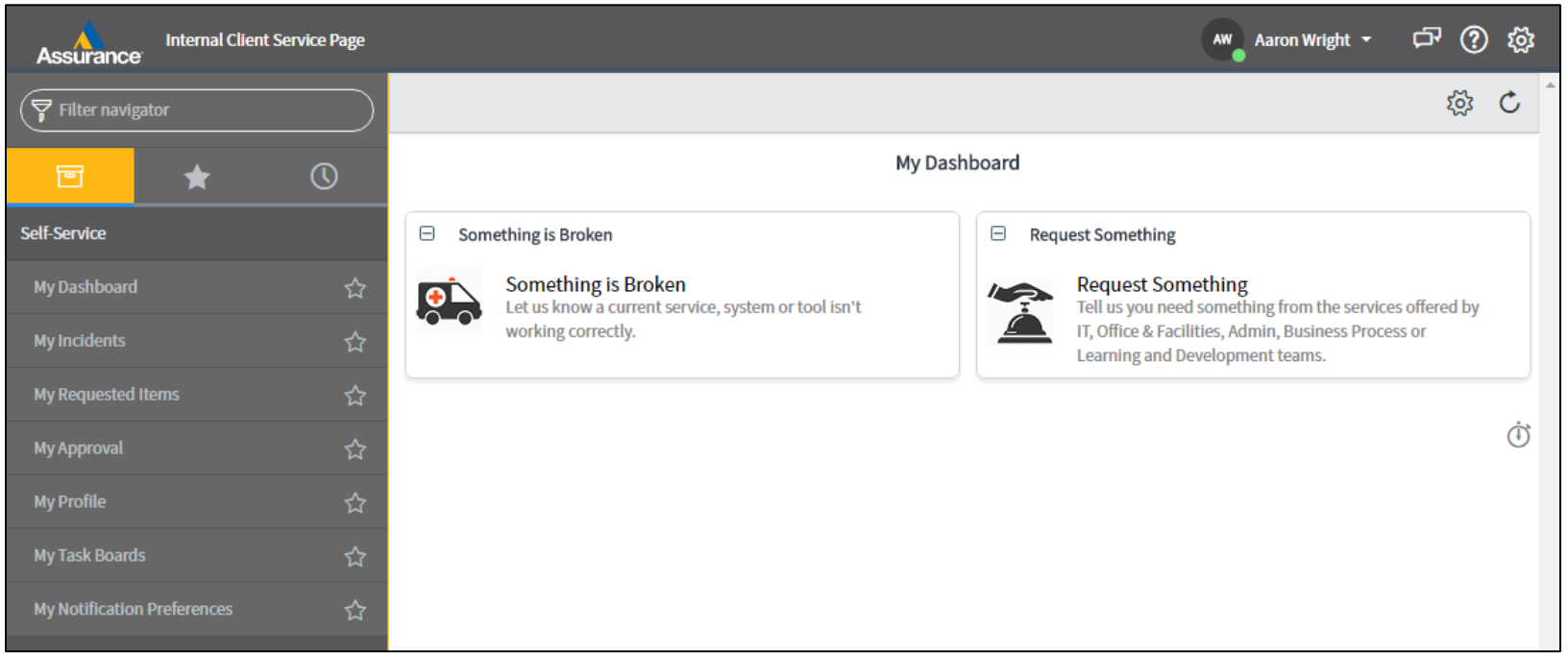


Listening

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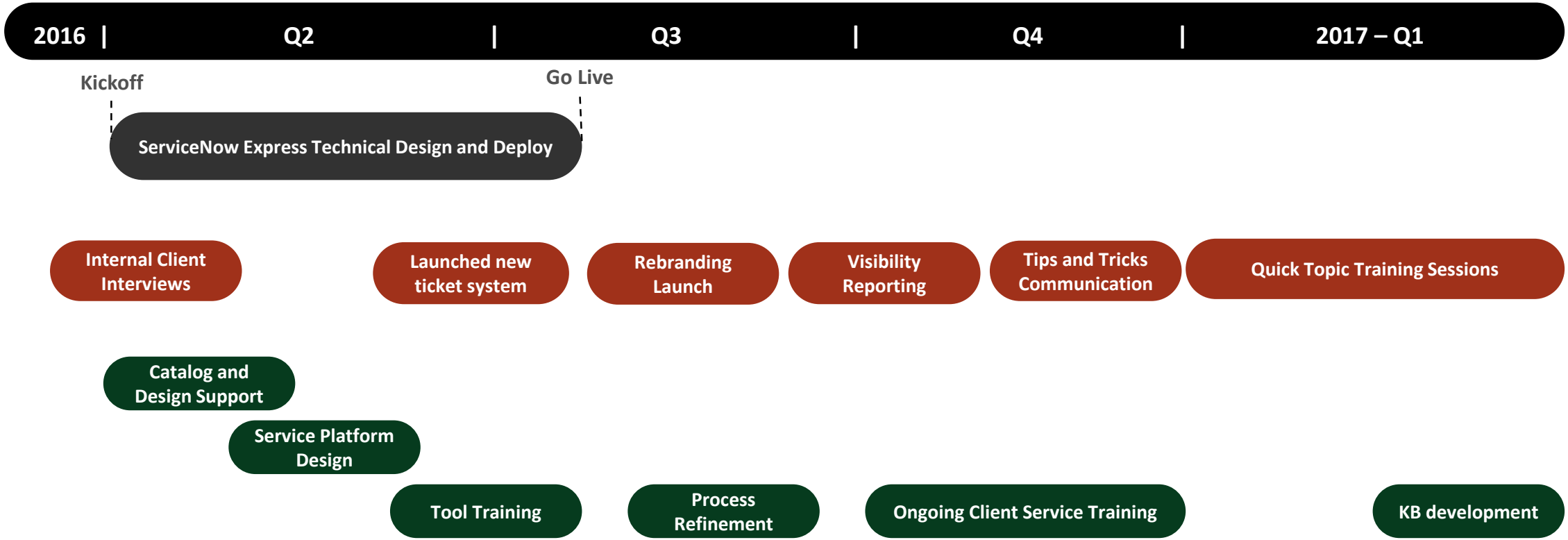
Solution at a Glance

- Establish a robust service culture able to support employee needs while providing a Smart, Reliable and Positive Client experience.
- ServiceNow Express allowed IT to develop a consistent branded solution platform
- Implemented core customer service principles



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Solution – Timeline



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Driving Awareness and Adoption

- ServiceNow Champion Enablement Center

- Templates and ideas to communicate and excite customer base
  - Hosting a go live celebration
  - Information training, lunch and learns
  - Surveys and customer metrics

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Branding – What's in a Name?

Why Change from IT Help Desk to IT Service Desk?

- Opportunity to refresh perception of IT
- Highlight dedication to service and support
- Showcase the team
- Launch new mission statement based on customer feedback
- IT staff actively engaged in the new definition creation
- Performance expectation and metric definitions



Our IT team is an internal service provider delivering smart and reliable solutions to Assurance, while delivering a continuous positive technology experience.

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What is a Service Platform?

It is the culmination of tools, services and communication standards that our department leverages to provide Smart, Reliable and Positive client experiences



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Service Platform – Common Interactions

1. Solve your clients issue or question
   - "How can I be of service?"
   - Listen – really listen
2. Look for teaching moments
   - "Do you mind if I show you how to do this?"
   - Quick training can build skills for our client and minimize support requests
3. Set time expectations
   - "This is going to take about ___ minutes to resolve – is now still a good time?
   - Be mindful of client's calendars and other commitments
   - If work effort is going longer than estimated – communicate and validate if you should continue
4. Dig a little deeper
   - "May I assist you with anything else?"
   - Don't rush to hang up or leave their workspace

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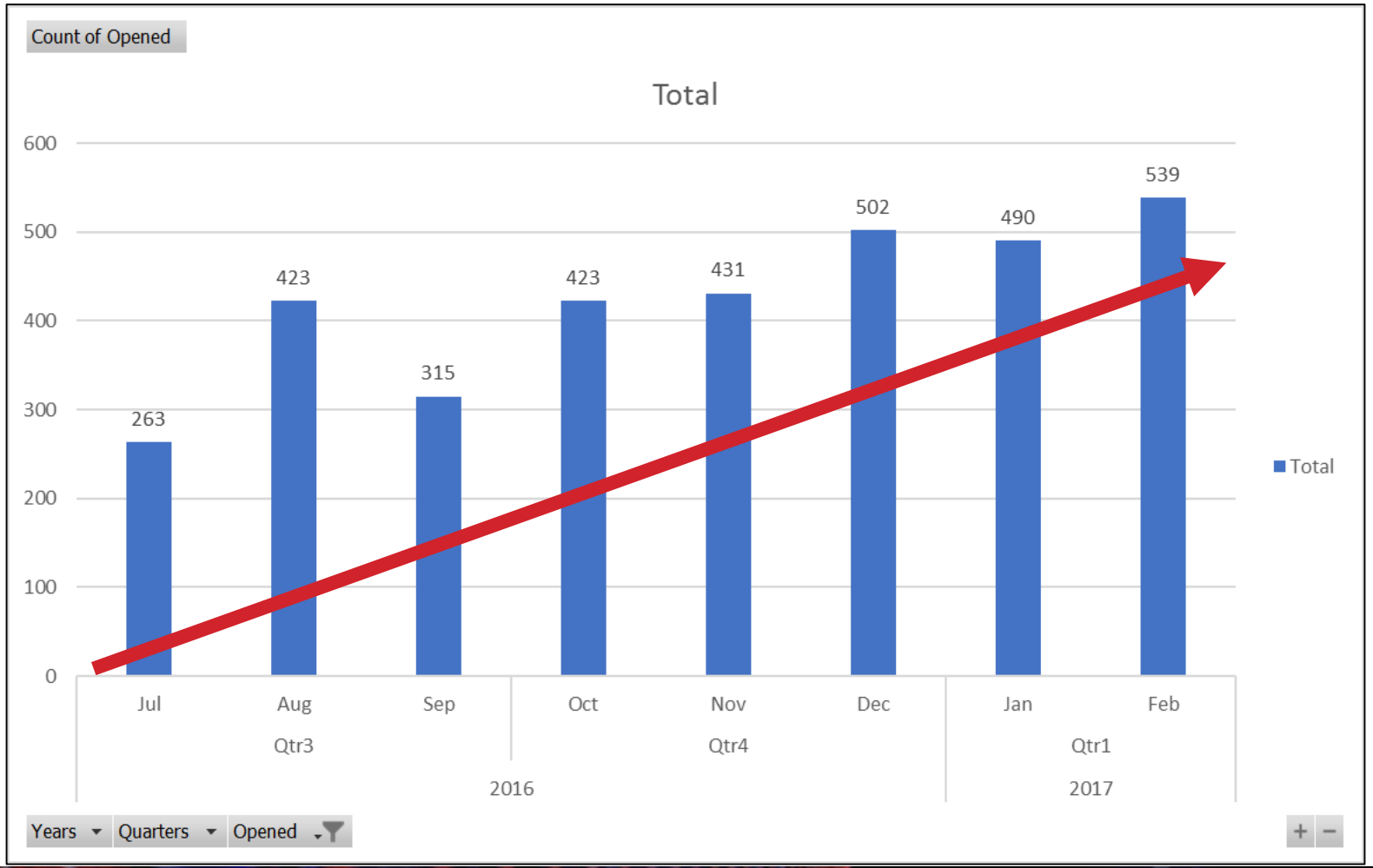
Service Platform – Client Service Phrases

1. “Happy to assist!”
2. “I understand how [blank] that must be.”
3. “Great question, I’ll find that out for you.”
4. “Nice to meet you.”
5. “May I ask why that is?”
6. “Thanks for bringing this to our attention / for the heads up!”
7. “I completely understand why you’d want that.”
8. “I’d love to understand more about that…”

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Solution – Relevant Data

Increase in End User Adoption and Use of the IT Service Desk, Measured in Open Tickets



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Our Next Steps

- Development of more client-facing self-service features (knowledge base)
- Operational metrics
- Refine SLA definitions
- Customer service benchmarking

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Top Takeaways

1

Standardize and centralize support interactions on a platform like ServiceNow

2

Engage your staff and clients – They must be part of the solution generation to really make the new brand stick!

3

Have fun and leverage marketing + ServiceNow resources to enhance the communication

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Thank You

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Q & A

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Take the Survey

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Thank You

Jim Maza

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