

7 KEY CONSIDERATIONS TO HELP GET YOUR MSP SERVICE DESK UP AND RUNNING – FAST!

GFI MAX Whitepaper



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Overview

As a Managed Service Provider (MSP) the quality of your service delivery can be vital for the growth and success of your business.

This white paper will cover the key areas you should consider when setting up your service desk to ensure you have good foundations in place to help you offer the best quality MSP service you can.

Find out:

- » Which categories will be useful when setting up your Service Desk system
- » How customers will be able to use the system
- » How you can use knowledge gained to improve service quality
- » What SLA and expectations could be set
- » How to define access and security levels
- » What Service Desk and support staff need to know
- » Key areas of best practice

Introduction: How can you ensure a great service experience?

Your Service Desk or MSP support service is the shop window to your organisation and can strongly influence customer perception of your overall service (and your business), regardless of the quality.

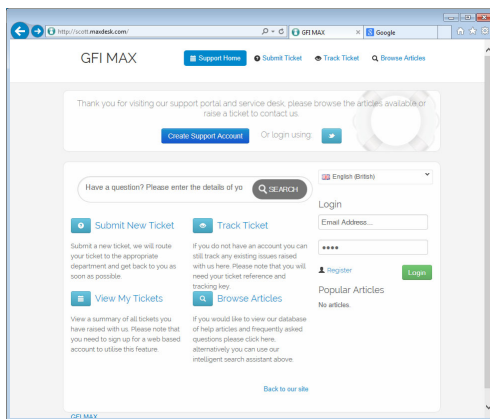
A great service experience can elevate average service delivery to a high satisfaction level, whereas of course a poor service experience can actually ruin a perfectly good product or service delivery. So it's vital for your growth and success that this is set up with professionalism and quality in mind.

Before we get to the 7 key things you need to consider to help you be successful here - there are several generic factors which are also worth thinking about as you establish your MSP Service Desk:

- » **People** – the people running and operating the service need to be skilled, supported and empowered in line with how you want the service and your business to be presented and perceived, e.g. presenting a competent, positive, dynamic, successful, motivated, professional and committed image.
- » **Model** – it's important to clearly define how the service works, in order to deliver consistent and accountable service quality. So you need some processes, work instructions and accountabilities defined and documented (even just in summary form).
- » **Supply chain** – every Service Desk is only as good as the MSP organization behind it, so the service it delivers needs to be supported, promoted and appreciated by other parts of your team and organization. We can think of this as a 'supply chain', whereby other teams or technicians provide support and relevant skills at key times to make the Service Desk a seamless and effective service for customers.
- » **Services** – It's also essential to be clear on what technology and business services are being supported and provided by the Service Desk to your customers. Clear expectation must be set firstly for the Service Desk service itself (available times, telephone response, etc.), then for the actual types and quality levels of technology support services and how these are delivered, e.g.:
 - Service Definition - what the service is e.g. financial applications, network monitoring, user support etc.

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- Quality Levels – any quantifiable metrics on what is being delivered, e.g. service availability.
 - Support details when things fail – response and fix SLAs, frequency of updates etc.
 - Value – what are the key outcomes that the MSP service delivers to the customer, e.g.: to process financial transactions, carry out admin, provide online retail, provide security etc.
- » **Tools** – you need technical systems to help you monitor and control your customers' services, in addition you need appropriate management tools (e.g. for logging, tracking and reporting) to help you provide a consistent, accountable and professional service.



GFI MAX ServiceDesk Tool

Ultimately your MSP Service Desk will provide the flagship point of contact for your organization, so it's worth spending some time and thought on making sure that you have the right foundations in place to make this work.

Try considering the 7 key questions below to help you get there:

1. *What categories will be useful?*

The value of good categorization on your tool cannot be over-estimated, for 2 reasons:

1. In order to ensure that you can deliver the most efficient and professional service and support as a live process, and...
2. ...to provide useable input to reporting and metrics – which can help you to develop and improve quality.

There are some simple steps that you can take to ensure that you get the most out of using the tool and to help develop quality.

It's useful to use separate categories for Logging, Tracking and Closing.

Logging – this should focus on the customer and the impact and severity of their issue. This can also include details of the service and technology that is affected. This helps to prioritize and to ensure that the issue is properly understood and classified

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Tracking involves status and ownership – who has the issue and what has and is happening with it? – this helps to ensure ownership and accountability, plus also visibility of the issue, to also avoid issues disappearing into a black hole – so this can also include SLA targets and identify potential breaches.

Closing requires assigning suitable information to the call which helps to understand and identify why it happened – so this could be completely different from the logging category.

Service Desks can learn and benefit from the examples of fixing and resolution supplied by their own support groups – so if the issue happens again they can react more quickly and effectively. It's essential to make sure that the information in a closed call is accurate, appropriate and re-useable.

Also: Try to keep the number of categories and sub-categories as small as possible – in order to provide useful and manageable output. Plus, keep control over how new categories are added – there should be a good reason for adding any new ones.

2. *How will our customers be able to use the system?*

Your customers should be able to log their own requests or issues via your portal – this can help to reduce calls and also provides a record of their contact.

Usually this is presented with a reduced and less function-rich UI than what your IT staff will see, so that customers can simply focus on a few key fields – and not be confused or given too many options of logging.

If customers can track their issues you need to ensure that the content of records is professional and understandable – i.e. avoiding any personal comments and also using appropriate no-technical and non-jargon language.

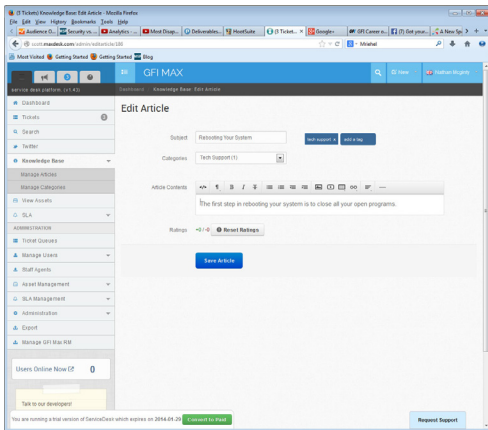
GFI MAX ServiceDesk Customer Logging Portal

3. *How can we use knowledge to improve our service quality?*

Once you have created a particular fix or piece of information about how to support a customer, obviously this can be re-used to provide a faster response and resolution if it recurs. This can save the customer and the MSP service operation time and money (i.e. if service is restored more quickly and at the first point of contact), so all the information that is entered into a service management system should be considered as potentially useful and re-useable.

To do this you need to consider how this (knowledge) will be captured and managed – ideally you need a pro forma for a 'knowledge article', such that these are produced in a consistent and useful way, particularly so that they are relevant for 1st line/Service Desk staff.

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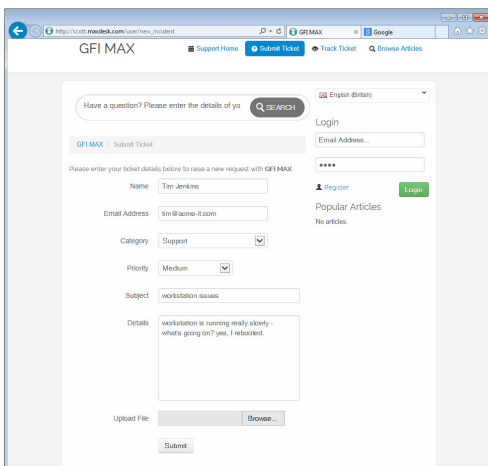


Creating an article in the GFI MAX ServiceDesk knowledge database

4. What sort of SLA and expectations can we set?

Service Level Agreements should really be ‘agreements’ between parties and therefore there are no finite ‘standard SLAs’ that can be picked off a website – they need to be based on your - and your customers’ - business needs.

Usually these relate to what happens when there is an issue or problem, but they should also ideally include service delivery targets – i.e. focusing on the positive not just the negative, when things go wrong. Remember that SLAs are applied to services, not the other way round, so you need to be clear on what the services are before you can define the SLAs...



Creating an SLA in GFI MAX ServiceDesk

Key areas covered by SLAs:

- » MSP Service Availability – when the technology service can be accessed, or e.g. when the Service Desk service is available etc.

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- » MSP Service Desk – ideally the SLA should be a ‘bundle’ of metrics relating to response time, fix time and customer satisfaction levels – e.g. Issue response time, issue fix time. The point is that individually these metrics only tell part of the story – you need to review and present them as a balanced set.
- » MSP Service Delivery – Did the service provide exactly what the customer needed and when? This will vary by customer so it’s useful to find out for them what their key metrics are – e.g. they may need to be able to send a payment at a specific time – so measure and report on that, as opposed to ‘blanket’ system availability

5. *How do we define access and security levels?*

There will be several levels of access required to your (Service Desk) system – Service Desk, support staff, system admin, customers – so it’s worth spending a moment working out what these groups are and what information they should and shouldn’t be able to see and/or update. Bear in mind that your customers should only see their own and not other customers’ data.

Physically defining and inputting this information is really easy on the system – you just need to be clear on the who, why and wherefore...

6. *What do Service Desk and support staff need to know?*

In order to provide a professional and competent service and image, MSP Service Desk staff need to have the following:

- » Clear definition and documentation on the services provided and supported.
- » Information on who the customers are, their commercial/contract details and their expectations – this really helps your professional image – your competitors may also provide this of course so you need to be at least equalling their offerings. The more specific and personal levels of service you can provide, the greater the service differentiator.
- » Definitions of the levels of support they are expected to deliver for each service – i.e. simply log and refer, fulfil requests, answer queries, deliver customer advice and tips, or resolve technical issues etc...
- » Technical skills and capability to deliver these levels of support.
- » Access to knowledge and documentation to support these levels of support.
- » Clear expectations and objective targets on the expectations of their performance – levels of support, customer contact and communications skills, expected volumes etc.
- » Feedback on performance – how individuals and the team are performing – are we doing a good job and how can we improve?

7. *What are key areas of best practice?*

In terms of development, the IT or Technology industry is moving from an engineering to a retail phase. Service Desks and IT Support is no longer just about providing technical skills – we need to understand our customers’ business needs and be aware of how we interact with them. Expectation from MSP customers is now heavily driven by their own experiences using mobile and personal technology.

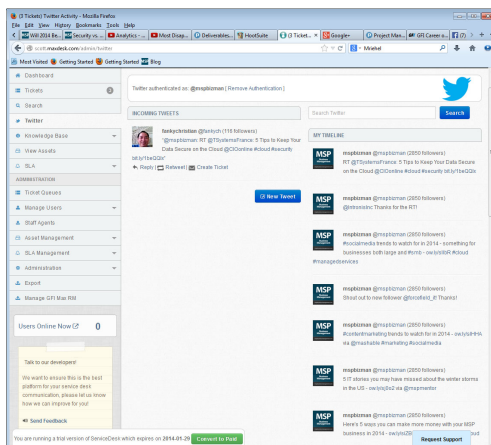
So 'Customer Experience' is a key concept that any service and support organization must consider – i.e. 'what is it like dealing or doing business with us' – this is now a key differentiator in the industry.

We also need to ensure that we can demonstrate that we understand what is important to our customers – hence the need to define, deliver, manage and report on 'services' rather than just 'systems'.

So whilst there are many 'best practice' frameworks and methodologies out there that can be used – the key focus must be on getting closer to your MSP customer and their business - that's the real best practice.

In practical terms, competitive MSP Service Desks need to be looking at the following areas:

- » Ensuring that customers can contact them and report issues by a variety of channels – phone, email, self-service, mobile and via social channels like Twitter.
- » Looking at areas like 'Social' not just as means of contact but also as a way to improve communications – greater visibility of problems usually results in faster resolution.
- » Developing more capability to support people rather than just technology – so providing consultancy type answers on how to do things (e.g. integrate personal technology), rather than just 'break-fix'.
- » Using video and other more accessible technologies to provide answers and solutions for customers – e.g. 'I'll send you a video of how to reload that printer'.



Twitter Ticketing in GFI MAX ServiceDesk

Overall, in terms of running a Service Desk or support operation, it can be useful to define a 'Code of Practice' – simply a clear set of expectation on what the service is how it is done, expected level of performance and professionalism etc.

This helps to reduce the amount of formality, procedures and documentation required – i.e. by giving staff a set of principles and expectations to work within, they are then empowered to go the extra mile to deliver great service, not constrained by too many rules.

In Summary

When setting up your MSP Service Desk it is important to do so with service quality in mind. By clearly defining your service offering, ensuring you have the best people and tools for the job and finally by considering the above information you can ensure you have a strong foundation for delivering quality service to your customers.

This white paper has used the GFI MAX ServiceDesk system to illustrate how you can combine these key considerations with the features and functionality of a helpdesk system to get your Service Desk up and running, quickly and efficiently.

GFI MAX ServiceDesk

Super-efficient, ultra-flexible, and extremely reliable, GFI MAX ServiceDesk provides MSPs with the ability to deliver a superior customer service and boost productivity. A powerful tool that streamlines your support processes, GFI MAX ServiceDesk helps you solve customer problems quicker - leaving you to focus on running your business, not your support team.

Using GFI MAX ServiceDesk you can streamline support with your own business needs:

- » Providing a single point of contact for customers seeking help for IT issues
- » Offer multi-channel engagement and support - converting Twitter messages to tickets, route email to service desk...and provide a self-service front end
- » Handle multiple accounts - so you don't have to juggle endless pieces of software
- » Keep track of incoming help requests - prioritizes tickets and progresses requests to the appropriate support team
- » Reduce incoming tickets by providing an effective self-service support portal

Integrated with our award-winning GFI MAX RemoteManagement tool, GFI MAX ServiceDesk is your support center, allowing you to adopt a super-robust online helpdesk and customer service solution.

About GFI MAX

GFI MAX helps over 9,000 IT Support Companies and MSPs globally grow monthly revenues from existing customers, attract new customers with affordable, high-value, easy-to-use services and deliver proactive, cost efficient services to grow an IT business profitably. GFI MAX provides a range of integrated software solutions built specifically for IT Support Companies and MSPs that are fast to implement, low effort to manage and fully brandable, so your customers see their value. The GFI MAX platform enables MSPs to provide managed antivirus, managed online backup, remote support, email security, automated monitoring, patch management, asset tracking, alerting, servicedesk support and viewing and reporting all from a single dashboard.

Learn more about GFI MAX, our products and how you can take full advantage of GFI MAX ServiceDesk to get your service desk up and running by visiting www.gfimax.com.

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