Chapter 6

Contents

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The Best NOC and Service Desk Operations Book Ever!

Table of Contents

*As always, every form, tool and piece of collateral discussed in this book is available as a download after registration at: **www.mspu.us/nocbookregistration**.*

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Section 6 – Hiring and Training Technical Staff

The following chapters will cover effective means for writing employment ads that attract the right talent, using DISC behavioral profiles before interviewing prospective NOC and Service Desk staff to make certain the outsourced service provider or internal service manager is interviewing the right candidates, how to interview these candidates and which questions to ask, along with creating an offer letter and employment agreement and developing a compensation plan and training requirements.

Writing Effective Employment Ads for Technical Staff

Writing an employment ad for technical staff may be the first HR act an outsourced service provider or internal service manager performs in the search for talent. Let's take a moment to understand the motivating factors behind technically-oriented people. Technical staff's ideal work environment may include challenging technical work, ongoing training opportunities and a team approach to problem solving and solution design and delivery, along with appreciation and respect for their contributions to the team; with high monetary incentives ranking lower on the list of requirements when seeking employment, or in their decision to remain with their current employer. Technicians' behavior normally falls into the Coordinator/ Supporter/ Relater areas of a DISC (behavioral) profile. A DISC profile is a psychometric testing technique that uses a simple questionnaire as a basis for revealing insights into a person's normal, adapted and work behaviors, and we will explore utilizing DISC profiles to our advantage during the hiring process in the next chapter.

Understanding these motivators for technical staff, effective employment ads highlight these specific areas in the body of the advertisement. The ad copy writer's job is to effectively promote the employment opportunity to the best technicians

available. The outsourced service provider or internal service manager is not looking for anybody that can fog a mirror – they want seasoned technicians and engineers, whose past performance is an indicator of their future potential.

A good new technical hire will dive right in to learning every last detail about the outsourced service provider's or internal service manager's NOC and Service Desk, and take it seriously to become a subject matter expert on everything they support. There is a clear pecking order with them, and their respect is earned by knowing more than they do about a particular subject. These are the type of individuals that jump right in to their positions soon after they are hired, and suck up information like a dry sponge.

Technicians and engineers see things as black and white problems to solve without a lot of emotion, and the really good ones can build personal relationships with clients and end users and understand that their job is to build rapport with them to establish the trust necessary to elevate the outsourced service provider's or internal service manager's NOC or Service Desk's overall perception as that of a valuable resource that can solve their technical problems and identify solutions to increase their efficiencies, productivity and mitigate their business pain and risk.

These behavioral traits are what to look for in technical staff. It can be difficult to find the right staff with the right mix of technical capability, customer service and desire to do the job right the first time.

But first things first – before the outsourced service provider or internal service manager has the ability to start the DISC profiling and interview process, they need candidates. And to get candidates interested in their employment opportunity they need to write compelling employment ads.

So they need to structure the employment ad to cover the basics, plus highlight the nuances that will attract the technical professionals they seek. In the old days (pre-Internet), it was necessary to excel at "classified ad shorthand" for print ads in the employment section of newspapers. This was the process where the ad copy writer would try to condense full words enough to save on the cost of the ad, while still conveying the gist of their message. Now the luxury of posting just about any size ad through online job sites such as Monster, Careerbuilder, Dice, Hotjobs and others for a reasonable fee, in addition to having it run for months at a time, greatly improves the process and results. Let's look at the basic components of an employment posting for a Service Desk position:

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Writing Effective Employment Ads for Technical Staff

Company name and location
Job status – Full Time, Employee
Relevant Work Experience – 3 years minimum
Job Category – Service Desk
Career Level – Experienced

Job Description – Several short paragraphs documenting the desired candidate's qualities, the position's responsibilities and job duties (emphasis on challenging technical work, ongoing training opportunities and a team approach to problem solving)

Minimum Skills Required – A short bulleted list of required skills and experience

Benefits – A short paragraph detailing salary range, bonuses and other benefits

A method of contacting the company

Okay, now let's take a look at a representative employment ad that conforms to many of the points in the above layout:

Company: MSP University
Location: Garden Grove, CA 92841
Status: Full-Time, Employee
Job Category: Service Desk

Relevant Work Experience: 3-5 Years
Career Level: Experienced (Non-Manager)

We are currently seeking a highly skilled Service Desk representative with the drive and determination to help us support our client base. This position reports to our service manager. We are looking for an individual who is a problem-solver and has a proven track record of working within a team environment to successfully address challenging user computing issues, and is accustomed to leveraging technical training opportunities to improve their skills. If you have the experience and the desire, we'd like to talk to you.

 Our Service Desk representatives are responsible for maintaining user uptime and improving their computing experiences through effective remote monitoring, maintenance and problem identification and resolution activities, as well as growing and developing the organization's perception with existing clients through exceptional customer service. Candidates must be energetic and focused with a strong motivation to learn new technologies and management and maintenance processes. This position requires dedication, persistence, follow-up, effective utilization of provided resources and unbeatable customer service.

Writing Effective Employment Ads for Technical Staff

This position will include identifying user problems and working within a structured problem management and resolution process to remediate issues within established SLAs, and involves working with other resources and vendors to deliver effective support services. Responsibilities include identifying, documenting and troubleshooting user computing issues to resolution and maintaining client satisfaction.

Job duties include utilizing our remote monitoring and management (RMM) and professional services automation (PSA) solutions along with other service-specific tools and technologies to deliver remote user support services and update service request information, answer technical support calls, assign ticket severity, prioritize work accordingly, and collaborate and work with other staff and vendor support resources to resolve issues. Overall relationship management and the ability to coordinate required resources to respond to complex IT requirements is desired. Other requirements include participating in ongoing training and attainment of manufacturer certifications, developing and maintaining relationships with user and vendor contacts, and preparing and presenting service and monitoring reports to management regularly.

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Minimum skills required:

- Minimum three years Service Desk experience
- Microsoft Certified Professional status
- Excellent knowledge of Microsoft software and technologies
- Strong interpersonal skills required to effectively communicate with users and vendors
- Passion for teamwork, continuing education, problem solving and exceptional customer service
- Must be well spoken, outgoing, organized, detailed-orientated, dependable and flexible
- Experience with HP, Cisco and Citrix technologies a plus
- Valid driver's license and proof of insurance
- Background check and drug screen required
- Reliable transportation

This position entails:

- Troubleshooting user problems over the phone and with remote control technologies
- Accurate documentation of all activities conducted
- The ability to manage, maintain, troubleshoot and support our users' networks, equipment, software and services
- The ability to learn quickly and adapt to changing requirements

Writing Effective Employment Ads for Technical Staff

The successful candidate must be:

- Professional and articulate
- Interpersonally adept
- Technically proficient
- A relationship builder
- A problem solver

Benefits include group medical/dental insurance, paid vacation, holidays, personal & sick time and training reimbursement. Our generous compensation plans are structured as salary plus bonuses for meeting utilization, compliance and customer service requirements, with initial compensation commensurate with relevant experience.

Qualified candidates please submit a current resume, along with salary history to: hr@mspu.us.

Resources

Careerbuilder.com
www.careerbuilder.com

Dice.com
www.dice.com

Hotjobs.com
www.hotjobs.com

Monster.com
www.monster.com

Using DISC Behavioral Profiles Before Interviewing Candidates

I remember clearly how hit-and-miss our success at hiring the right staff used to be before we discovered the value of utilizing DISC behavioral profiling in our hiring process. Based upon the groundbreaking work of William Moulton Marston Ph.D. (1893 - 1947) in the (then) emerging field of psychology, DISC measures four dimensions of normal human behavior:

- **Dominance** - relating to control, power and assertiveness (how we respond to problems or challenges)
- **Influence** - relating to social situations and communication (how we influence others to our point of view)
- **Steadiness** (submission in Marston's time) - relating to patience, persistence, and thoughtfulness (how we respond to the pace of our environment)
- **Conscientiousness** (or caution, compliance in Marston's time) - relating to structure and organization (how we respond to rules and procedures set by others)

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We have not only been able to significantly improve our success rate at hiring the right staff since implementing DISC profiling, but we have used DISC profiles to help in team-building efforts. If you haven't read Jim Collins' excellent book "Good to Great", do yourself a favor and pick up a copy. One of the key concepts in "Good to Great" is that of not only "getting the right people on the bus", but "getting the right people in the right seats on the bus". DISC behavioral profiles help us achieve both of these objectives.

Based upon answering a series of twenty-four questions, each with the directive to choose what a candidate is "most like" and "least like", the DISC profile will generate a voluminous report describing the subject's behavior with incredible accuracy. Here is a representative example of the types of questions a subject is asked to answer in a DISC profile:

Each question has two answers – choose one answer that indicates which you are **Most Like**, and one answer that indicates which you are **Least Like**. Each question requires two choices:

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Most Like	Least Like	
		Gentle, kindly
		Persuasive, convincing
	x	Humble, reserved, modest
x		Original, inventive, individualistic
		Attractive, Charming, attracts others
x		Cooperative, agreeable
		Stubborn, unyielding
	x	Sweet, pleasing
	x	Easily led, follower
x		Bold, daring
		Loyal, faithful, devoted
		Charming, delightful

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It seems almost unbelievable that merely completing twenty-four questions like this can create a comprehensive behavioral profile that we have come to rely on in each and every one of our hiring decisions. And I've got to admit that when we have gone ahead and made a hiring decision in spite of some red flags uncovered by a DISC profile, we've always come to regret it.

Here's a sample portion of a fictitious DISC profile:

Elizabeth prefers being a team player, and wants each player to contribute along with her. Many people see her as a self-starter dedicated to achieving results. She can be blunt and critical of people who do not meet her standards. She may have difficulty dealing with others who are slower in thought and action. Elizabeth has the ability to question people's basic assumptions about things. She prides herself on her creativity, incisiveness and cleverness. She can be incisive, analytical and argumentative at times. She is aggressive and confident. She tends to have a "short fuse" and can display anger or displeasure when she feels that people are taking advantage of her. Elizabeth is forward-looking, aggressive and competitive. His vision for results is one of her positive strengths. She is comfortable in an environment that may be characterized by high pressure and is variety-oriented.

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Elizabeth will work long hours until a tough problem is solved. After it is solved, Elizabeth may become bored with any routine work that follows. She is logical, incisive and critical in her problem-solving activities. She sometimes gets so involved in a project that she tends to take charge. She usually takes time when confronted with a major decision; that is, she takes an unemotional approach to analyzing the data and facts. Others may see this as vacillating; however she is just thinking through all the ramifications of her decision. Elizabeth finds it easy to share her opinions on solving work-related problems. Sometimes she may be so opinionated about a particular problem that she has difficulty letting others participate in the process. She sometimes requires assistance in bringing major projects to completion. She may have so many projects underway that she needs help from others. She likes the freedom to explore and the authority to re-examine and retest her findings.

Elizabeth tends to be intolerant of people who seem ambiguous or think too slowly. She usually communicates in a cool and direct manner. Some may see her as being aloof and blunt. When communicating with others, Elizabeth must carefully avoid being excessively critical or pushy. She tries to get on with the subject, while others may be trying to work through the details. She is skilled at asking informed questions and extracting information, but for some people she may need

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to phrase her questions more tactfully. Her creative and active mind may hinder her ability to communicate to others effectively. She may present the information in a form that cannot be easily understood by some people. Others often misunderstand her great ability as a creative thinker. She is not influenced by people who are overly enthusiastic. They rarely get her attention. She may display a lack of empathy for others who cannot achieve her standards.

Here are some other excerpts from Elizabeth's DISC Profile:

Value to the organization:

This section of the report identifies the specific talents and behavior Elizabeth brings to the job. By looking at these statements, one can identify her role in the organization. The organization can then develop a system to capitalize on her particular value and make her an integral part of the team.

- Thinks big
- Forward-looking and future-oriented
- Presents the facts without emotion
- Places high value on time
- Usually makes decisions with the bottom line in mind
- Innovative
- Always looking for logical solutions
- Initiates activity
- Challenge-oriented

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Ideal environment:

This section identifies the ideal work environment based on Elizabeth's basic style. People with limited flexibility will find themselves uncomfortable working in any job not described in this section. People with flexibility use intelligence to modify their behavior and can be comfortable in many environments. Use this section to identify specific duties and responsibilities that Elizabeth enjoys and also those that create frustration.

- Evaluation based on results, not the process
- Non-routine work with challenge and opportunity
- An innovative and futuristic-oriented environment
- Projects that produce tangible results
- Data to analyze
- Private office or work area
- Environment where she can be a part of the team, but removed from office politics
- Forum to express ideas and viewpoints

Perceptions:

A person's behavior and feelings may be quickly telegraphed to others. This section provides additional information on Elizabeth's self-perception and how, under certain conditions, others may perceive her behavior. Understanding this section will empower Elizabeth to project the image that will allow her to control the situation.

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Self-perception:

Elizabeth usually sees herself as being:

- Pioneering
- Assertive
- Competitive
- Confident
- Positive
- Winner

Other's perception:

Under moderate pressure, tension, stress or fatigue, others may see her as being:

- Demanding
- Nervy
- Egotistical
- Aggressive

And, under extreme pressure, stress or fatigue, others may see her as being:

- Abrasive
- Controlling
- Arbitrary
- Opinionated

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Descriptors:

Based on Elizabeth's responses, the report has marked those words that describe her personal behavior. They describe how she solves problems and meets challenges, influences people, responds to the pace of the environment and how she responds to rules and procedures set by others.

Dominance	Influencing	Steadiness	Compliance
Demanding	Effusive	Phlegmatic	Evasive
Egocentric	Inspiring	Relaxed	Worrisome
		Resistant to Change	Careful
Driving	Magnetic	Nondemonstrative	Dependent
Ambitious	Political		Cautious
Pioneering	Enthusiastic	Passive	Conventional
Strong-Willed	Demonstrative		Exacting
Forceful	Persuasive	Patient	Neat
Determined	Warm		
Aggressive	Convincing	Possessive	Systematic
Competitive	Polished		Diplomatic
Decisive	Poised	Predictable	Accurate
Venturesome	Optimistic	Consistent	Tactful
		Deliberate	
Inquisitive	Trusting	Steady	Open-Minded
Responsible	Sociable	Stable	Balanced Judgment
Conservative	Reflective	Mobile	Firm
Calculating	Factual	Active	Independent
Cooperative	Calculating	Restless	Self-Willed
Hesitant	Skeptical	Alert	Stubborn
Low-Keyed		Variety-Oriented	
Unsure	Logical	Demonstrative	Obstinate
Undemanding	Undemonstrative		
Cautious	Suspicious	Impatient	Opinionated
	Matter-of-Fact	Pressure-Oriented	Unsystematic
Mild	Incisive	Eager	Self-Righteous
Agreeable		Flexible	Uninhibited
Modest	Pessimistic	Impulsive	Arbitrary
Peaceful	Moody	Impetuous	Unbending
Unobtrusive	Critical	Hypertense	Careless with Details

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Adapted style:

Elizabeth sees her present work environment requiring her to exhibit the behavior listed on this page. If the following statements DO NOT sound job related, explore the reasons why she is adapting this behavior.

- Precise, analytical approach to work tasks
- Acting without precedent, and able to respond to change in daily work
- Sensitivity to existing rules and regulations
- Limited contact with people
- Disciplined, meticulous attention to order
- Having the ability to see the "big picture" as well as the small pieces of the puzzle
- Careful, thoughtful approach to decision making
- Quickly responding to crisis and change, with a strong desire for immediate results
- Anticipating and solving problems
- Persistence in job completion
- Dealing with a wide variety of work activities
- Calculation of risks before taking action
- Accurate adherence to high quality standards

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Keys to motivating:

Elizabeth wants:

- Evaluation on not only the results achieved, but the quality of the work and the price she paid for performance
- Sincere appreciation for achievements--may interpret as manipulation if overdone
- To explore new ideas and authority to test her findings
- To be part of a quality-oriented work group
- Support staff to do detail work
- To know the agenda for the meeting
- New challenges and problems to solve
- Freedom from controls that restrict her creativity
- To be seen as a leader
- Prestige, position and titles so she can control the destiny of others
- Meetings that stay on the agenda, or reasons for changing the agenda

Keys to managing:

Elizabeth needs:

- To know results expected and to be evaluated on the results
- To adjust her intensity to match the situation

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- To be more cooperative with other team members
- A program for pacing work and relaxing
- To analyze constructive criticism to see if it's true and how it may be impacting her career
- To display empathy for people who approach life differently than she does
- To understand that her tendency to tell it like it is may reduce performance rather than raise it with some people
- To understand her role on the team--either a team player or the leader
- To negotiate commitment face-to-face
- Appreciation of the feelings of others
- To be objective and listen when others volunteer constructive criticism
- The opportunity to ask questions to clarify or determine why

Areas for improvement:

In this area is a listing of possible limitations without regard to a specific job. Review with Elizabeth and cross out those limitations that do not apply. Highlight 1 to 3 limitations that are hindering her performance and develop an action plan to eliminate or reduce this hindrance.

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Elizabeth has a tendency to:

- Have no concept of the problems that slower-moving people may have with her style
- Be inconsistent because of many stops, starts and ever-changing direction
- Set standards for herself and others so high that impossibility of the situation is common place
- Have difficulty finding balance between family and work
- Have trouble delegating--can't wait, so does it herself

I hope by now you can see how extremely valuable this tool is, and why we choose to include it as a requirement during our hiring process.

So how exactly do we use the DISC profile? Well, we will review all of the resumes that come in for a particular job posting, and then determine who our top candidates are. After this, we will conduct a quick phone interview with each candidate, and the ones that make it to the next cut will be emailed a link to take our DISC behavioral profile online. We then review the resultant report, and decide who to call in for in-person interviews.

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For technical staff candidates, in addition to the standard DISC behavioral profile, we will also have them take a specialized version of the DISC profile, called the Personal Talent Skills Inventory (PTSI). The PTSI is an objective analysis of the candidate's understanding of themselves, their strengths and their weaknesses. An individual's talents and personal skills are a fundamental and integral part of who they are. The PTSI describes what an individual "can do" in 23 capacities, or personal skills, related to the business environment.

The PTSI is designed to capture how people see themselves and the world around them. To do this, it measures a person from two perspectives, external and internal, and in six dimensions, three in each perspective.

External:

- Empathetic Outlook ⇒ Judgment of people
- Practical Thinking ⇒ Judgment of tasks
- Systems Judgment ⇒ Judgment of systems

Internal:

- Sense of Self ⇒ Judgment of being
- Role Awareness ⇒ Judgment of doing
- Self Direction ⇒ Judgment of becoming

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The PTSI report provides a ranking of personal skills that describe an individual's potential for workplace performance by determining their capability in several areas. After analyzing the clarity, bias and intensity of each of the six dimensions, one can begin to understand an individual's self view and world view, gaining true insight into the internal and external perspectives that affect superior performance.

Understanding problem-solving techniques, and the ability to implement them effectively during service delivery, is how we define a successful technical resource. We utilize the PTSI to identify a candidate's problem-solving strengths and weaknesses and their ability to perform these functions in the workplace.

The following is a sample of the results from a fictitious PTSI:

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Name: Elizabeth

World View

This is how Elizabeth sees the world around her. This view measures her clarity and understanding of people, tasks and systems. It could also be looked at in terms of feeling, doing and thinking from an external standpoint. The statements below are based primarily on the 3 dimensions on the left side of the dimensional balance page and are in a random order.

- Elizabeth may benefit from improving her relationships with authority figures
- She needs an environment in which contributions are recognized, properly rewarded, and appreciated.
- She has the ability to become action-oriented in order to complete the task at hand
- She performs best in an atmosphere where there is an open exchange of ideas and where feedback is readily available.
- Elizabeth can be versatile and can adapt to different types of people and changing situations
- She may benefit from understanding the importance of interpersonal relationships
- She needs an atmosphere that has structure and a defined chain of command
- She understands how to deal with ideas, knowledge, and systems

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- Elizabeth has the ability to use her people skills in order to relate to others

Self View

This is how Elizabeth sees herself. This view measures her clarity and understanding of herself, her roles in life and her direction for the future. The internal dimensions are a reflection of her from both personal and professional viewpoints. The statements below are based primarily on the 3 dimensions on the right side of the dimensional balance page and are in a random order.

- Elizabeth tends to use her internal awareness to achieve the desired outcome during the process of a role change
- She may apply her life planning skills for personal growth
- She has a grasp of her actual and potential accomplishments, life roles and activities
- She has achieved a moderate level of self-understanding
- Elizabeth believes that her own worth is based equally on her sense of self, her life roles, and growing as a person
- She may focus on gaining information to clearly envision herself in the future

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- She could get into a comfort zone which could restrict her from developing or applying more of her potential
- She tends to have a balanced understanding of herself, her roles and her future development
- Elizabeth tends to be adaptable, depending on what is called for in the current situation

As you can tell, this portion of the PTSI provides a good understanding of a candidate's perceptions of not only external environments such as the workplace, but of themselves as well, and can also be utilized as a tool to improve an existing technical candidate's skills or interpersonal relationships with others. The following section illustrates the PTSI's findings of a candidate's critical success skills in a visually appealing manner, and ranks the candidate's responses against the population:

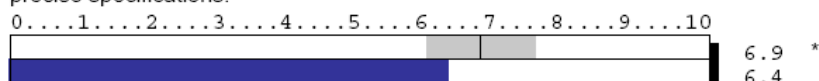# The Best NOC and Service Desk Operations Book Ever!

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Critical Success Skills

ATTITUDE TOWARD OTHERS: The general capacity one has for relating with other people.

```
0....1....2....3....4....5....6....7....8....9....10
```
7.9 *
7.7
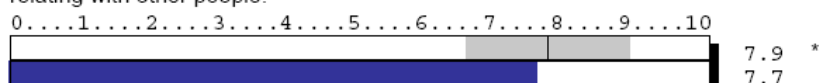
MEETING STANDARDS: The ability to perform work according to precise specifications.

```
0....1....2....3....4....5....6....7....8....9....10
```
6.9 *
6.4

JOB ETHIC: The capacity to fulfill the professional responsibilities with a strong sense of moral duty and obligation they have been given.
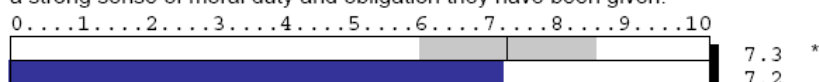
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0....1....2....3....4....5....6....7....8....9....10
```
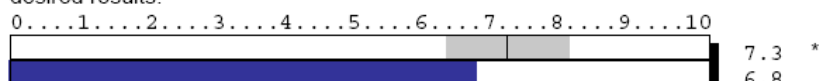7.3 *
7.2

PROBLEM SOLVING: The ability to identify key components of the problem, possible solutions and the action plan to obtain the desired result.

```
0....1....2....3....4....5....6....7....8....9....10
```
7.5 *
7.5
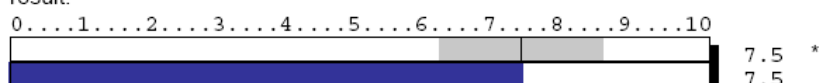
RESPECT FOR PROPERTY: A measure of the level of respect and appreciation for the property that belongs to others or the company.
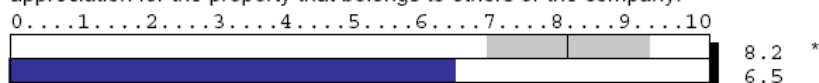
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0....1....2....3....4....5....6....7....8....9....10
```
8.2 *
6.5

RESULTS ORIENTATION: The capacity to clearly and objectively understand and implement all variables necessary to obtain defined or desired results.
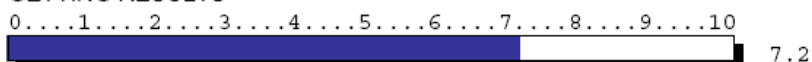
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0....1....2....3....4....5....6....7....8....9....10
```
7.3 *
6.8

* 68% of the population falls within the shaded area.

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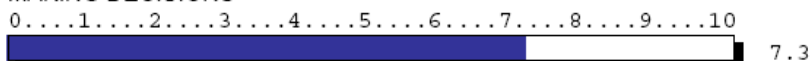

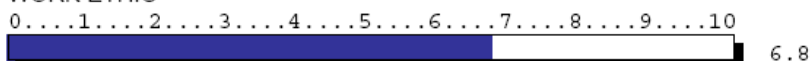## The General Employment Skills Summary

```
GETTING RESULTS
0....1....2....3....4....5....6....7....8....9....10
                                                        7.2

INTERPERSONAL SKILLS
0....1....2....3....4....5....6....7....8....9....10
                                                        7.1

MAKING DECISIONS
0....1....2....3....4....5....6....7....8....9....10
                                                        7.3

SELF MANAGEMENT
0....1....2....3....4....5....6....7....8....9....10
                                                        6.5

WORK ETHIC
0....1....2....3....4....5....6....7....8....9....10
                                                        6.8
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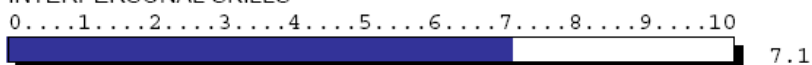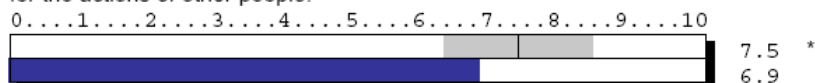
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## Using DISC Behavioral Profiles Before Interviewing Candidates

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Getting Results

ACCOUNTABILITY FOR OTHERS: A willingness to take responsibility for the actions of other people.

```
0....1....2....3....4....5....6....7....8....9....10
```
7.5 *
6.9

ATTENTION TO DETAIL: The ability to pay attention to the specific elements, facets or parts of a situation or work assignment.

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0....1....2....3....4....5....6....7....8....9....10
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8.0 *
7.5
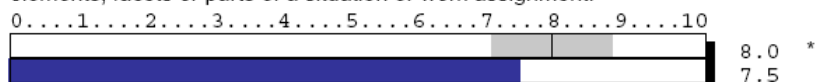
CONSISTENCY AND RELIABILITY: The capacity to regularly and dependably engage in and complete tasks or processes.
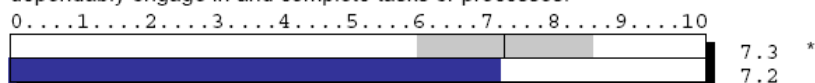
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7.3 *
7.2

PROBLEM SOLVING: The ability to identify key components of the problem, possible solutions and the action plan to obtain the desired result.

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7.5 *
7.5
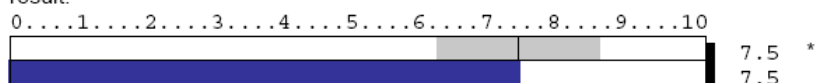
PROJECT AND GOAL FOCUS: The capacity to concentrate one's full attention on the project or goal at hand, regardless of distractions or difficulties.
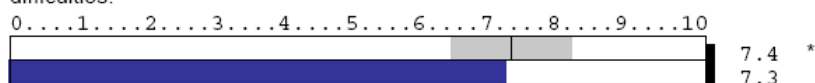
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0....1....2....3....4....5....6....7....8....9....10
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7.4 *
7.3

RESULTS ORIENTATION: The capacity to clearly and objectively understand and implement all variables necessary to obtain defined or desired results.

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0....1....2....3....4....5....6....7....8....9....10
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7.3 *
6.8

* 68% of the population falls within the shaded area.

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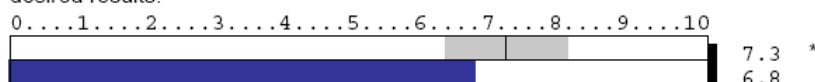
Using DISC Behavioral Profiles Before Interviewing Candidates

As you can see from these graphical representations, Elizabeth consistently scored highly in almost every area of the PTSI. Based upon the information reflected in this Personal Talent Skills Inventory, along with an evaluation of Elizabeth's DISC behavioral profile, it's immediately apparent that she would make a good candidate for a position on our technical team.

Because we realize the tremendous value the DISC behavioral profile and Personal Talent Skills Inventory offer to any employer, we have created a DISC profile service for our partners which not only allows them to run online DISC profiles for their own staffing requirements, but also affords them the opportunity to re-sell this service to their clients, and earn additional revenue for providing this valuable online service. For more information, and to order a complimentary DISC profile of your own, visit the following link on our website: www.mspu.us/disc.htm.

The Interview Process for Hiring Technical Staff

Now that we've reviewed the DISC behavioral profile and Personal Talent Skills Inventory results of our top candidates, we can decide which of these merit an in-person interview. Note that we have minimized much of the effort we used to expend when hiring staff in the old days. Those were the days when candidates would show up to our offices after sending in a resume that looked promising, and we'd take lots and lots of time out of our busy schedules to interview them. And guess what? Many of the interviews for technical positions went really well – making it difficult for us to choose the right candidate.

Always remember to keep in mind the candidate's current employment situation during the interview and hiring process, and ask pointed questions regarding their prior and current employment history. A great technical candidate should not currently be out of work, unless there is a very compelling reason for it. It's simple logic to assume that successful, aggressive and motivated technical resources worth their salt should currently be employed. And if they are successful, they should look and act the part. A good candidate realizes the value of first impressions and follow-up. If they're not dressed to impress, and speak confidently and articulately during interviews, that's strike one. If they don't initiate good follow-up after interviews, that's strike two. If they are not responsive to your attempts at contact after interviews, that's strike three.

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The Interview Process for Hiring Technical Staff

Successful technical candidates will have a firm knowledge of their history at previous employers, and be able to communicate their skill set, certifications and technical experience, in addition to their salaries and bonus plans for the past 3 years. We're also going to ask them specific questions about their daily duties, roles and responsibilities, and how much of their compensation was based upon meeting quotas for utilization, billing, client satisfaction and adhering to SLAs, and how often they failed to achieve them. If they stutter or stammer, or begin tap-dancing during this line of questioning, that's a red flag. And as with any potential hire, spotty or short tenure at previous employers is always a matter for concern. Read between the lines of the candidate's resume, and don't be afraid to ask the tough questions – be direct and look for the same in return. If you're not good at confrontation, for Pete's sake, please have someone else perform these initial interviews for you. The ultimate effectiveness of your service delivery begins with the decisions you make during the hiring process.

Let's take a look at areas to evaluate when interviewing a technical staff candidate (depending upon their experience and areas of expertise, an experienced technical person will qualify themselves by answering the following questions successfully):

The Interview Process for Hiring Technical Staff

- Ask the candidate to verbalize their basic problem management and resolution strategy
- Is the candidate experienced and trained in PSAs, trouble-ticketing systems and RMM solutions? If so, ask them to describe which ones and their experience with them.
- How does the candidate keep up with new technology?
- What are the candidate's certifications?
- What are the candidate's existing utilization numbers at their current/recent position?
- How many service requests does the candidate close per day/week/month at their current/recent position?
- What is the candidate's current/recent job title and function?
- Does the candidate have experience providing proactive, reactive support, or both?
- What percentage of time does the candidate provide remote support at their current/recent position?
- What percentage of time does the candidate provide onsite support at their current/recent position?
- Does the candidate have experience with producing service reports?
- Ask the candidate to describe successful methods they've used to calm an irate user or client with specific examples

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The Interview Process for Hiring Technical Staff

- Ask the candidate to provide a history of the hardware they have worked with and to rank their expertise in same
- Ask the candidate to provide a history of the software they have worked with and to rank their expertise in same
- Ask the candidate to provide a history of the solutions they have worked with and to rank their expertise in same
- Ask the candidate to provide a history of the vendors they have worked with and to describe their relationship
- What metrics is the candidate's measured by in their current/recent position and how often do they exceed them?
- What support tier does the candidate currently participate in at their current/recent position?
- How many other technical resources comprise the candidate's business unit at their current/recent position?
- What percentage of time does the candidate spend mentoring other technical resources at their current/recent position?
- What percentage of time does the candidate spend troubleshooting an issue before deciding to escalate it?
- Has the candidate ever managed a team of resources? If so, ask them to describe these situations, their role

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and responsibilities and success at achieving their objective.
- Verbalize several support scenarios specific to the position the candidate is interviewing for, and ask them how they would approach and resolve them

For an exhaustive list of technical questions to ask the candidate, browse to the following links at Daniel Petri's excellent IT Knowledgebase:

- **Networking:**
  http://www.petri.co.il/mcse_system_administrator_networking_interview_questions.htm
- **Active Directory:**
  http://www.petri.co.il/mcse_system_administrator_active_directory_interview_questions.htm
- **Microsoft Exchange:**
  http://www.petri.co.il/mcse-system-administrator-exchange-interview-questions.htm
- **PC Support:**
  http://www.petri.co.il/mcse-system-administrator-pc-technician-interview-questions.htm

The interview questions contained at the links above on the Petri Knowledgebase are comprehensive – take a look at these when developing your interview and testing process for new technical hires and don't reinvent the wheel.

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The Interview Process for Hiring Technical Staff

Based upon review of the Personal Talent Skills Inventory and candidate's performance during the initial interview, determine whether the candidate can qualify to join your technical staff, once they understand your particular processes and procedures, tools and technology.

These are the technical-specific areas we will cover during the initial live interview with all candidates, as well as the technical-specific activities they will be asked to perform during the interview (such as taking a written technical test or troubleshooting a test pc, server or network "sabotaged" for this purpose). The best technical candidates will rise to the top of the list naturally. But let me throw out a cautionary note here – we don't want to make the mistake of hiring the best candidate of the bunch just because they are the best candidate of the bunch. We've got to hire the best candidate for our organization. This means we must be prepared to interview many candidates before making the commitment to hire and train one.

Some general questions we would also like to have answered include:

- What do you know about our company?
  - What we are gauging here is their preparation for the interview – a good candidate would have researched our website, at the very least
- Tell me a little bit about yourself and your previous employment history
  - What we are looking for is a brief description of their work history & skills, a narrative of their personal and professional experiences
- What are some of your strengths?
  - This question should not be difficult for the candidate to answer
- What are some of your weaknesses?
  - A good candidate should not have any trouble naming 3 weaknesses – give them plenty of time to answer
- What do you see yourself doing in 3 years? …. how about in 5 years?
  - Is the candidate a goal-setter?
- Tell me about a time when you made a mistake with a client and what steps you took to resolve the issue
  - Look for awareness of fallibility, and gauge the candidate's problem-resolution technique
- What do you get excited about? …. What upsets you?
- What situations make you lose your temper?

- These last two questions are more personal in nature, and will be explored in more detail when discussing the candidate's DISC Profile with them
- What was one of your greatest successes?
- What are 3 things you do extremely well?
  - A solid candidate will have no trouble answering these questions
- What are 3 things that you need to improve on?
  - A good candidate should not have any trouble naming all 3 things – give them plenty of time to answer
- In a group or team what position do you take on – leader, coordinator or support?
  - We're looking for natural leaders here
- Tell us about a team you have worked in
  - What we are looking for is what their role was, again to determine if they are a leader, facilitator, or socializer
- What are three positive things your last boss would say about you?
  - A good candidate should have no problem answering this question
- How much guidance and management do you like?
  - We are trying to determine how independent the candidate is
- How much do you feel you need?

- o A good candidate will be able to verbalize when they need direction
- What type of people do you work best with?
    - o This may elicit a canned response, but we may also get a nugget of insight if the person replies, "People who aren't idiots."
- If budgets were of no concern at your current or previous employer, what would be the first thing you would spend money on and why?
    - o The answer to this question gives an insight as to how involved the person was at their previous job. How quickly candidate responds lets us know how much thought they've put into this subject in the past.
- Can you send us an example of something you've written – a quote or proposal?
    - o We need to gauge the candidate's ability to write quotes and proposals, if required
- Is there anything that would interfere with your regular attendance?
    - o A boilerplate question which may reveal any personal conflicts
- What would your perfect job look like?

- o This is the candidate's opportunity to push the envelope, and test our response – the more descriptive, the better
- Why should we hire you? …. What makes you more qualified than the other applicants?
  - o This is the candidate's opportunity to sell us and try to close the position
- What skills do you possess that you think would benefit our company? ….How do you see yourself fitting in?
  - o A follow-up on the previous line of questioning
- Rate yourself on a scale of 1-10 on Word, Excel, PowerPoint, Outlook, Vista…
  - o We're looking for the candidate's proficiency with our basic office applications
- How do you respond to pressure & deadlines?
  - o There isn't a specifically wrong answer here, but we're looking for the candidate's coping mechanism – we might hear: "It stresses me out when…", to which our follow-up would be: "How do you deal with it"?, to which they might answer: "I just get out of the office for a few minutes, and take a walk to clear my head"
- If you could start your career again, what would you do differently?

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- o We're looking for an honest appraisal
- How would you describe your personality?
  - o Easy going, problem solver, director, like talking to people, make friends easily, etc.
- What is your favorite movie of all time? Why?
  - o Just a question to loosen up the mood, we might find a common interest and chat for a bit
- Describe a time when you made a client/client extremely happy?
  - o A positive, reinforcing question
- Do you mind if we call your former employer?
  - o A good reason for a negative answer here must be offered
- Why are you considering a career change at this time, or leaving your current position?
- What do you like and dislike about your current position?
  - o A couple of basic interview questions meant to provide insight into the candidate's current state of mind and desires
- What about this position do you find the most appealing? .... Least appealing?
  - o We're looking for something in addition to the compensation

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- In your present position, what internal problems have you identified and taken action to fix?
  - We're gauging how deeply the candidate cares to involve themselves as a change agent for the benefit of others besides themselves
- What kind of feedback have you received from past clients?
  - Expect positive reviews here
- How have you handled negative feedback from clients, or team members?
  - We're looking for a truthful response here – ask for a specific incident
- Give an example of a time where there was a conflict in a team/group that you were involved in and how it was resolved.
  - What did they do, how did they handle it? What we are looking for is the ability to go straight to the source. Telling the boss right away, without telling the person concerned or ignoring the situation and hoping it will go away are not good signs.
- Do you have any questions for us?
  - A good candidate will always have questions

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These are all excellent questions to pose to potential candidates for our technical position. I'm certain you can now see why we don't just interview anyone that can fog a mirror – the interview and hiring process is lengthy, and deservedly so – we need to be absolutely certain to do everything in our power to minimize the possibility of hiring the wrong person. If we're going to spend the considerable time and money to hire and train a new technical person, we want an excellent return on our investment.

So let's say we've found one or two candidates that we feel have the "right stuff", and would be a positive addition to our team. Our next step is to schedule an interview with *another member* of our organization. At MSPU, all job candidates for key roles are interviewed by either I or my business partner. If they are a technical candidate, I perform the first live interview, and if they are a sales and marketing candidate, Gary performs the first live interview. Then we swap roles, so Gary gets to perform the second live interview with all technical candidates, and I do the same for the sales and marketing candidates. This second interview will either validate or solidify the decision to hire a candidate, or not. Like it or not, unless we're a seasoned HR or hiring professional, sometimes it's difficult to be completely objective during the interview and hiring process. This is where having another trusted individual available to compare

notes with can be invaluable – especially in situations when there needs to be a "tie-breaker" – two equally qualified candidates that we may find challenging to choose between.

In addition, when I'm the second interviewer, I know that the candidate has already passed muster in order to get to me, so I begin exploring other areas that the first interviewer may not have covered – to answer questions about compatibility (will the candidate be able to fit into our culture), and I try to gauge from a gut feeling (I know, the DISC profile doesn't lie!) and comfort level my impression of how easy it will be to work with and integrate the candidate into our organization. I'll ask questions specifically intended to reveal the more personal side of the candidate, like what their taste in movies or T.V. shows is, what they do for recreation, and ask them about their immediate family, as well as their parents and their backgrounds; to get an idea of their stability and support system, and attempt to uncover any stressors that may affect performance on the job. This is all carried out in a friendly, conversational, "get to know me" manner, where I will share personal information with the candidate myself, a la Hannibal Lecter in Silence of the Lambs "…*quid pro quo, Clarisse*…."

If the candidate stands a good chance of joining the team, it's important to begin building a relationship early on. If we really want to win over a candidate, we need to show them the

human side of our organization, as well as the career opportunity. Assuming the second interview goes well, we now have a green light to formalize an offer to the successful candidate. During the first interview, items such as compensation and duties and responsibilities would naturally have been discussed, as well as a projected start date of employment, should the candidate be awarded the position.

It's now time to formalize our offer to the successful candidate by means of an offer letter.

The Offer Letter

The offer letter will detail our intent to hire the candidate, what their roles and responsibilities will be, as well as their compensation, bonus and benefits plan. As with any and all forms used in your business practice, please consult with your legal advisor before relying on them.

Let's take a look at a standard offer letter:

Offer of Employment and Employment Contract

Monday, September 1st, 2008

(Employee's Name)

(Employee's Address)

Dear (Employee Name);

We are pleased to offer you a position with MSP University ("Company"). Your start date, manager, compensation, benefits, and other terms of employment will be as set forth below and on EXHIBIT A.

TERMS OF EMPLOYMENT

1. **Position and Duties.** Company shall employ you, and you agree to competently and professionally perform such duties as are customarily the responsibility of the position as set forth in the job description attached as EXHIBIT A and as reasonably assigned to you from time to time by your Manager as set forth in EXHIBIT A.

2. **Outside Business Activities.** During your employment with Company, you shall devote competent energies, interests, and abilities to the performance of your duties under this Agreement. During the term of this Agreement, you shall not, without Company's prior written consent, render any services to others for compensation or engage or participate, actively or passively, in any other business activities that would interfere with the performance of your duties hereunder or compete with Company's business.

3. **Employment Classification.** You shall be a Full-Time Employee and shall not be entitled to benefits except as specifically outlined herein.

4. **Compensation/Benefits**.

   4.1 **Wage.** Company shall pay you the wage as set forth in the job description attached as EXHIBIT A.

4.2 **Reimbursement of Expenses**. You shall be reimbursed for all reasonable and necessary expenses paid or incurred by you in the performance of your duties. You shall provide Company with original receipts for such expenses.

4.3 **Withholdings**. All compensation paid to you under this Agreement, including payment of salary and taxable benefits shall be subject to such withholdings as may be required by law or Company's general practices.

4.4 **Benefits.** You will also receive Company's standard employee benefits package (including health insurance), and will be subject to Company's vacation policy as such package and policy are in effect from time to time.

5. **At-Will Employment.** Either party may terminate this Agreement by written notice at any time for any reason or for no reason. This Agreement is intended to be and shall be deemed to be an at-will employment Agreement and does not constitute a guarantee of continuing employment for any term.

6. **Nondisclosure Agreement.** You agree to sign Company's standard Employee Nondisclosure Agreement, Non-Compete

and Proprietary Rights Assignment as a condition of your employment. We wish to impress upon you that we do not wish you to bring with you any confidential or proprietary material of any former employer or to violate any other obligation to your former employers.

7. **Authorization to Work.** Because of federal regulations adopted in the Immigration Reform and Control Act of 1986, you will need to present documentation demonstrating that you have authorization to work in the United States.

8. **Further Assurances.** Each party shall perform any and all further acts and execute and deliver any documents that are reasonably necessary to carry out the intent of this Agreement.

9. **Notices.** All notices or other communications required or permitted by this Agreement or by law shall be in writing and shall be deemed duly served and given when delivered personally or by facsimile, air courier, certified mail (return receipt requested), postage and fees prepaid, to the party at the address indicated in the signature block or at such other address as a party may request in writing.

10. **Governing Law.** This Agreement shall be governed and interpreted in accordance with the laws of the State of California, as such laws are applied to agreements between

residents of California to be performed entirely within the State of California.

11. **Entire Agreement.** This Agreement sets forth the entire Agreement between the parties pertaining to the subject matter hereof and supersedes all prior written agreements and all prior or contemporaneous oral Agreements and understandings, expressed or implied.

12. **Written Modification and Waiver.** No modification to this Agreement, nor any waiver of any rights, shall be effective unless assented to in writing by the party to be charged, and the waiver of any breach or default shall not constitute a waiver of any other right or any subsequent breach or default.

13. **Assignment.** This Agreement is personal in nature, and neither of the parties shall, without the consent of the other, assign or transfer this Agreement or any rights or obligations under this Agreement, except that Company may assign or transfer this Agreement to a successor of Company's business, in the event of the transfer or sale of all or substantially all of the assets of Company's business, or to a subsidiary, provided that in the case of any assignment or transfer under the terms of this Section, this Agreement shall be binding on and inure to the benefit of the successor of Company's business, and the

successor of Company's business shall discharge and perform all of the obligations of Company under this Agreement.

14. **Severability.** If any of the provisions of this Agreement are determined to be invalid, illegal, or unenforceable, such provisions shall be modified to the minimum extent necessary to make such provisions enforceable, and the remaining provisions shall continue in full force and effect to the extent the economic benefits conferred upon the parties by this Agreement remain substantially unimpaired.

15. **Arbitration of Disputes.** Any controversy or claim arising out of or relating to this contract, or the breach thereof, shall be settled by arbitration administered by the American Arbitration Association under its National Rules for the Resolution of Employment Disputes, and judgment upon the award rendered by the arbitrator(s) may be entered by any court having jurisdiction thereof.

We look forward to your arrival and what we hope will be the start of a mutually satisfying work relationship.

Sincerely,

MSP University

By: _____
     MSPU Authorized Representative

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The Offer Letter

_____

Acknowledged, Accepted, and Agreed

Date: _____

By: _____
    Employee

Once the employee signs the Offer Letter, they will have formally agreed to the terms and conditions of our employment as described. An EXHIBIT A would follow this agreement, stipulating the employee's job description, duties and compensation. Let's review an example EXHIBIT A:

Exhibit "A"

Job Description – Service Desk Analyst

Start Date Is Monday, January 4, 2010

N·able

The Offer Letter

This position will require, but not be limited to the following Essential Responsibilities:

- Provide remote and onsite desktop, laptop, server and network problem management and resolution services to clients and end users via Company's communications and remote and onsite support solutions, processes and procedures
- Identify, document, prioritize, troubleshoot and escalate service requests per Company's problem management and resolution processes and SLAs
- Perform proactive maintenance of client and end user hardware, software and services per Company's established processes and best practices
- Maintain and pursue I.T. training competencies and certifications per Company's established training schedule and requirements
- Maintain Company standards for client satisfaction, utilization and compliance policies
- Utilize Company's PSA and RMM solutions per Company's established processes to deliver maintenance and problem management and resolution services to clients and end users

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The Offer Letter

- Interface with clients, end users and vendor support resources as needed to deliver services within established SLAs
- Maintain communication with all affected parties during problem management and resolution per Company's established processes and procedures

Base Salary for this position will be ($) per year.

Eligibility to participate in quarterly bonuses will be determined by meeting established Company utilization, process and policy compliance, attainment of training and competencies/certifications, adherence to SLAs and customer service performance metrics:

Utilization requirement score: (%)

Process and policy compliance score: (%)

Attainment of competencies: (%)

Adherence to SLAs score: (%)

Customer service score: (%)

Of course, your particular business model, products, services job requirements and compensation schedules will dictate how you structure EXHIBIT A.

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The Employment Agreement

As part of the HR and hiring process, we are going to require our new technical person to sign an employment agreement. The employment agreement will detail the technical person's job title and duties and responsibilities, and will contain non-disclosure and non-compete language in order to protect ourselves from the potential for one of our competitors to hire our technical person away at some later date, and leverage our business plans, processes or other intellectual property against us. Depending upon your local or state laws, NDA and non-compete language and/or agreements will need to be tailored specifically to protect your rights in a court of law. As with any and all forms used in your business practice, please consult with your legal advisor before relying on them.

Let's take a look at a standard Employment Agreement:

EMPLOYMENT AGREEMENT

This Employment Agreement (this "Agreement") is made effective by and between MSP University ("MSPU"), of 7077 Orangewood Avenue, Suite 104, Garden Grove, California, 92841 and (employee's name) ("Employee"), of (employee's address).

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The Employment Agreement

A. MSPU is engaged in the business of Providing Information Technology Services. Employee will primarily perform the job duties at the following location: 7077 Orangewood Avenue, Suite 104, Garden Grove, California.

B. MSPU desires to have the services of Employee.

C. Employee is willing to be employed by MSPU.

Therefore, the parties agree as follows:

1. EMPLOYMENT. MSPU shall employ Employee as a (job title). Employee shall provide to MSPU the following services: duties as needed. Employee accepts and agrees to such employment, and agrees to be subject to the general supervision, advice and direction of MSPU and MSPU's supervisory personnel. Employee shall also perform (i) such other duties as are customarily performed by an employee in a similar position, and (ii) such other and unrelated services and duties as may be assigned to Employee from time to time by MSPU.

2. BEST EFFORTS OF EMPLOYEE. Employee agrees to perform faithfully, industriously, and to the best of Employee's ability, experience, and talents, all of the duties that may be required by the express and implicit terms of this Agreement, to the

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reasonable satisfaction of MSPU. Such duties shall be provided at such place(s) as the needs, business, or opportunities of MSPU may require from time to time.

3. EXPENSE REIMBURSEMENT. MSPU will reimburse Employee for "out-of-pocket" expenses incurred by Employee in accordance with MSPU policies in effect from time to time.

4. RECOMMENDATIONS FOR IMPROVING OPERATIONS. Employee shall provide MSPU with all information, suggestions, and recommendations regarding MSPU's business, of which Employee has knowledge, which will be of benefit to MSPU.

5. CONFIDENTIALITY. Employee recognizes that MSPU has and will have information regarding the following:

- inventions

- products

- product design

- processes

- technical matters

- trade secrets

The Employment Agreement

- copyrights

- client lists

- prices

- costs

- discounts

- business affairs

- future plans

- marketing plans and methods

- communications

- meetings

- conversations

- training

- emails

- faxes

- documents

- wage and compensation information

- disciplinary actions

- policies

and other vital information items (collectively, "Information") which are valuable, special and unique assets of MSPU. Employee agrees that Employee will not at any time or in any manner, either directly or indirectly, divulge, disclose, or communicate any Information to any third party without the prior written consent of MSPU. Employee will protect the Information and treat it as strictly confidential. A violation by Employee of this paragraph shall be a material violation of this Agreement and will justify legal and/or equitable relief.

6. UNAUTHORIZED DISCLOSURE OF INFORMATION. If it appears that Employee has disclosed (or has threatened to disclose) Information in violation of this Agreement, MSPU shall be entitled to an injunction to restrain Employee from disclosing, in whole or in part, such Information, or from providing any services to any party to whom such Information has been disclosed or may be disclosed. MSPU shall not be prohibited by this provision from pursuing other remedies, including a claim for losses and damages.

7. CONFIDENTIALITY AFTER TERMINATION OF EMPLOYMENT. The confidentiality provisions of this Agreement shall remain

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in full force and effect for a 1 year period after the termination of Employee's employment.

8. NON-COMPETE AGREEMENT. Employee recognizes that the various items of Information are special and unique assets of the Company and need to be protected from improper disclosure. In consideration of the disclosure of the Information to Employee, Employee agrees and covenants that for a period of 1 year following the termination of this Agreement, whether such termination is voluntary or involuntary, Employee will not compete directly or indirectly with MSPU. The term "not compete" shall mean that the Employee shall not, on Employee's behalf or on behalf of any other party, solicit or seek the business of any client or account of the Company existing during the term of employment and wherein said solicitation involves a product and/or service substantially similar to or competitive with any present or future product and/or service of the Company. This covenant shall apply to the geographical area that includes all of the State of California and any other state in which the Company has clients. Directly or indirectly engaging in any competitive business includes, but is not limited to: (i) engaging in a business as owner, partner, or agent, (ii) becoming an employee of any third party that is engaged in such business, (iii) becoming interested directly or indirectly in any such business, or (iv) soliciting any client of MSPU for the

benefit of a third party that is engaged in such business. Employee agrees that this non-compete provision will not adversely affect Employee's livelihood.

9. EMPLOYEE'S INABILITY TO CONTRACT FOR EMPLOYER. Employee shall not have the right to make any contracts or commitments for or on behalf of MSPU without first obtaining the express written consent of MSPU.

10. BENEFITS. Employee shall be entitled to employment benefits, including holidays, sick leave, and vacation as provided by MSPU's policies in effect from time to time.

11. TERM/TERMINATION. Employee's employment under this Agreement shall be for an unspecified term on an "at will" basis. This Agreement may be terminated by MSPU at will and by Employee upon 2 Week's written notice. If Employee is in violation of any part of this Agreement, MSPU may terminate employment without notice and with compensation to Employee only to the date of such termination. The compensation paid under this Agreement shall be Employee's exclusive remedy.

12. COMPLIANCE WITH EMPLOYER'S RULES. Employee agrees to comply with all of the rules and regulations of MSPU.

13. RETURN OF PROPERTY. Upon termination of this Agreement, Employee shall deliver to MSPU all property which is MSPU's property or related to MSPU's business (including keys, records, notes, data, memoranda, models, and equipment) that is in Employee's possession or under Employee's control. Such obligation shall be governed by any separate confidentiality or proprietary rights agreement signed by Employee.

14. NOTICES. All notices required or permitted under this Agreement shall be in writing and shall be deemed delivered when delivered in person or on the third day after being deposited in the United States mail, postage paid, addressed as follows:

Employer:

MSPU

(MSPU Representative)

(MSPU Representative's title)

7077 Orangewood Avenue, Suite 104

Garden Grove, California 92841

The Employment Agreement

Employee:

(Employee Name)

(Employee Street Address)

(Employee City, State ZIP)

Such addresses may be changed from time to time by either party by providing written notice in the manner set forth above.

15. ENTIRE AGREEMENT. This Agreement contains the entire agreement of the parties and there are no other promises or conditions in any other agreement whether oral or written. This Agreement supersedes any prior written or oral agreements between the parties.

16. AMENDMENT. This Agreement may be modified or amended, if the amendment is made in writing and is signed by both parties.

17. SEVERABILITY. If any provisions of this Agreement shall be held to be invalid or unenforceable for any reason, the remaining provisions shall continue to be valid and enforceable. If a court finds that any provision of this

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Agreement is invalid or unenforceable, but that by limiting such provision it would become valid or enforceable, then such provision shall be deemed to be written, construed, and enforced as so limited.

18. WAIVER OF CONTRACTUAL RIGHT. The failure of either party to enforce any provision of this Agreement shall not be construed as a waiver or limitation of that party's right to subsequently enforce and compel strict compliance with every provision of this Agreement.

19. APPLICABLE LAW. This Agreement shall be governed by the laws of the State of California.

EMPLOYER:

MSP University

By: _____Date: _____

(Authorized MSPU representative name/title)

AGREED TO AND ACCEPTED.

The Employment Agreement

_____

EMPLOYEE:

By: _____Date: _____

The Equipment Loan Agreement

From time to time, and based upon the technical staff's needs, it may become necessary to supply them with company-owned equipment in order to provide them the ability to fulfill their duties and responsibilities. Examples of equipment that can be furnished to employees may include:

- Vehicles
- PCs
- Laptops
- Wireless PC cards
- Cell phones/Smart phones/PDAs
- Pagers
- Security tokens
- Key cards/credentials
- Test equipment
- Inventory

This equipment obviously has value to the company, so it is a good idea to have a solid equipment loan agreement in place documenting it and its value, and holding the employee responsible for keeping it in good condition. The equipment loan agreement also makes it easier to reclaim equipment when an employee leaves the organization, as they agree to forfeit the cost to replace the equipment from their pay

should they fail to return it according to the terms of their employment agreement. Let's take a look at a standard equipment loan agreement:

Equipment Loan

Statement of Understanding

I am taking possession of the following equipment belonging to MSP University (Company):

_____

Description

_____

Model Number, Serial Number

which has a replacement cost of $
_____

I will take reasonable and necessary steps to safeguard this equipment from damage and theft.

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If this equipment is damaged or stolen, I will report the relevant facts as soon as possible to my supervisor. I further understand that I have an obligation to pursue recovery for Company from such a loss through my relevant insurance coverage, whether automobile, homeowner's or tenant's.

I understand that I must return this equipment as instructed to Company premises within twenty-four hours of being asked to do so by my supervisor or Company administration.

I understand that I must immediately return this equipment as instructed to Company premises in the event that my employment ends, whether by voluntary quit or involuntary termination.

I agree and hereby give permission to Company to deduct from my pay any amount I owe to Company (up to the replacement cost noted above) due to my failure to return this equipment in working condition to Company as documented in my Employment Agreement.

_____

Employee Signature, printed name and date

_____

Date EQUIPMENT RETURNED:

_____

Received By

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Compensation Plans

Throughout the years we've had the opportunity to work with our partners, one of the topics that seem to be the most challenging for them is creating an equitable compensation plan for technical staff. Now, as IT service providers, our perception of an equitable compensation plan and our technical staff's perception of an equitable compensation plan may not always match. A generally accepted industry statistic regarding compensation is that a technician should generate two and a half times their W-2 compensation in billable labor time. This means that a technical person earning $60,000 a year on their W-2 should be generating $150,000 in billable labor time per year.

Billable time based on W-2 earnings

W-2 Earnings	Billable Labor
$30,000	$75,000
$40,000	$100,000
$50,000	$125,000
$60,000	$150,000
$70,000	$175,000
$80,000	$200,000
$90,000	$225,000
$100,000	$250,000

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Salary.com reports the following U.S. national averages for total compensation (base salaries, bonuses and benefits) for the following technical positions as of January, 2010 on their website at http://swz.salary.com/salarywizard/layoutscripts/swzl_newsearch.asp:

Help Desk Support Jr.-Sr. (Service Desk Staff)

Benefit	Median Amount		% Of Total	
Base Salary	$44,900	$52,608	68.5% -	69.4%
Bonuses	$906	$1,135	1.4% -	1.5%
Social Security	$3,504	$4,111	5.3% -	5.4%
401k/403b	$1,741	$2,042	2.7% -	2.7%
Disability	$458	$537	0.7% -	0.7%
Healthcare	$6,103	$6,103	9.3% -	8.0%
Pension	$2,290	$2,687	3.5% -	3.5%
Time Off	$5,638	$6,615	8.6% -	8.7%
Total	**$65,540**	**$75,839**	**100%**	

Source: salary.com

Please note that the median Service Desk staff's bonuses in the US as reported in January 2010 by salary.com amount to about 1.5% of their total take-home compensation. In our experience, this is extremely low, as we would bonus our

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Service Desk staff upwards of 10% of their total salary for achieving goals set for:

- Utilization requirements
- Process and policy compliance
- Attainment of competencies
- Adherence to SLAs
- Customer service

We would base customer service scores upon survey responses. In addition, bonuses could be attained individually and by the entire group on a monthly, quarterly and yearly basis. This was designed so that if an individual resource achieved their minimum goals in each area for the month, they would be eligible to receive a bonus. If they achieved the bonus each month for the entire quarter, they would be eligible to receive a quarterly bonus as well. If the entire team achieved their bonuses each month in a quarter, they would be eligible to receive a quarterly team bonus, and if they were able to achieve a quarterly team bonus through 4 consecutive quarters, they would be eligible to receive a yearly bonus. All of these bonuses would be in addition to previously-received bonuses, so the individual Service Desk staff could potentially be eligible to receive the following bonuses:

- Monthly individual bonus

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- Quarterly individual bonus
- Quarterly team bonus
- Yearly team bonus

Service Dispatcher Jr.-Sr.

Benefit	Median Amount		% Of Total	
Base Salary	$34,910	$42,063	67.1% -	68.2%
Bonuses	$475	$764	0.9% -	1.2%
Social Security	$2,707	$3,276	5.2% -	5.3%
401k/403b	$1,345	$1,627	2.6% -	2.6%
Disability	$354	$428	0.7% -	0.7%
Healthcare	$6,103	$6,103	11.7% -	9.9%
Pension	$1,769	$2,141	3.4% -	3.5%
Time Off	$4,355	$5,271	8.4% -	8.5%
Total	**$52,017**	**$61,674**	**100%**	

Source: salary.com

Note that the median service dispatcher's bonuses in the US as reported in January 2010 by salary.com amount to about 1.2% of their total take-home compensation. This is low in our experience, as we bonused our dispatcher a small amount based upon meeting SLAs, along with allowing participation in team bonuses, but their bonus did not quite rival the Service Desk staff's.

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Service Desk Manager

Benefit	Median Amount	% Of Total
Base Salary	$84,146	67.7%
Bonuses	$6,923	5.6%
Social Security	$6,967	5.6%
401k/403b	$3,461	2.8%
Disability	$911	0.7%
Healthcare	$6,103	4.9%
Pension	$4,553	3.7%
Time Off	$11,208	9.0%
Total	**$124,272**	**100%**

Source: salary.com

Note that the median Service Desk manager's bonuses in the US as reported in January 2010 by salary.com average 5.6% of their total take-home compensation. This matches our experience.

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NOC Manager

Benefit	Median Amount	% Of Total
Base Salary	$95,508	70.5%
Bonuses	$4,250	3.1%
Social Security	$7,708	5.6%
401k/403b	$3,849	2.8%
Disability	$1,008	0.7%
Healthcare	$6,103	4.5%
Pension	$5,038	3.7%
Time Off	$12,401	9.1%
Total	**$136,844**	**100%**

Source: salary.com

Note that the median NOC manager's bonuses in the US as reported in January 2010 by salary.com average about 3.1% of their total take-home compensation. This matches our experience.

A compensation plan for a new technical person will normally be structured as base salary plus bonuses. A base salary is a guaranteed amount of compensation the technical person will receive each month, and if they meet specific goals set by their supervisor during the month, quarter and year, additional bonuses can be realized.

In a base plus bonus compensation plan, we generally see small bonus percentages structured in to support the

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guaranteed base salary, and engineered in such a manner as to reward the technical staff on activity that helps the organization increase efficiencies and client satisfaction, among other factors – all of which in one form or another drive additional profits to the bottom line. This is where the bonuses are paid out from – the additional revenues that the technical staff helps to generate.

Now I hope I've done a decent job of presenting different ways of looking at technical compensation and bonus plans for you. Please do not take any of the figures in this chapter as gospel – but rather visit salary.com to drill deep and utilize their filtering capabilities and input your zip code, state or metro area to discover what the median compensation is being reported for the technical roles required for your service delivery model and mode. I've used information gathered from partners, and the rest from our own experience to help you get started.

If you'd like a much more granular compensation report, browse to www.mspu.us/en/tools and pick up the Service Leadership Index™ 2009 Solution Provider Compensation Report™. This 100-page report covers more than 40 positions in solution provider practices and is the only solution-provider-specific salary survey available.

Let me caution you against thinking that by reading this chapter you will be able to save yourself some homework and come away with a ready-made compensation plan that you can simply slap your company's name on, implement and be successful with.

You've got to do your own legwork and investigation into what your true margins and profitability are for each of your services, products and solutions. From there, you've got to dig down deep into your gut and come up with a realistic expectation of how much increased profitability each of your technical resources can achieve, and of this number, what you are comfortable with incenting your staff to qualify for.

Training Technical Staff

The function of training technical staff in an IT services organization, NOC or Service Desk is obviously much different than training staff in other businesses or business units. In addition to training technical staff in NOC and Service Desk overall day-to-day operations and functions, there need to be opportunities for technical staff to receive the role-specific training required to make them effective, efficient and successful, in order to receive the maximum return on their hiring investment.

Let's identify the common training that will be delivered to all staff, regardless of their job description, before going into role-specific technical training topics:

- Company Overview Training
    - Vision, mission, values, philosophy, goals
- HR Process Training
    - Overview of compensation, benefits, conduct, sick day and vacation policy, Employee handbook, acceptable use policy
- Administrative Setup and Training
    - User and email account creation, telco account, extension and voicemail creation,
    - Use of company equipment (cell phone, PC, laptop, etc.)
    - Use of company software, Instant Messaging, remote access and remote email

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- Formal introduction to management and staff
  - o Tour of facility
  - o Introduction to all management and staff

The above points cover in broad strokes some of the tasks associated with any new employee's basic training and indoctrination to an organization – of course, the outsourced service provider's or internal service manager's policies and procedures may differ from those illustrated.

So what role-specific training is needed to deliver to insure a technical person's success? Let's highlight some of the obvious areas for their managers to address:

- Internal tools and technology training
  - o Make certain all technical staff is trained on internal tools
    - PSA solution
    - RMM solution
    - Remote control solution
    - Quoting solution
    - Technical drawing solution
    - Project planning/management solution
    - Specialty solutions
    - All others

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- Processes and procedures
  - Make certain all technical staff is trained on all processes and procedures
    - Employee handbook
    - Incident management, escalation and resolution
    - Remote monitoring and management
    - Remote control
    - Patching and updating
    - Documentation
    - Customer service
    - Reporting
    - All others
- Product and Service Training
  - Make certain all technical staff is trained on all of products and services delivered
- Roles and responsibilities
  - Make certain all technical staff is trained on their own, as well as other team members' roles, responsibilities and expectations
- Clients
  - Make certain all technical staff is trained on the organization's clients and their individual needs, requirements and SLAs
- Fulfillment partners

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- o Make certain all technical staff is trained on the organization's fulfillment partners, their services and their engagement process
- Vendors
  - o Make certain all technical staff is trained on the organization's vendors, their services and their engagement process
- Goals and bonuses
  - o Make certain all technical staff is trained on their individual and team goals and bonus programs
- Competency and certification achievement
  - o Make certain all technical staff is trained on the organization's requirements for their attainment of additional competencies and certifications

Role-Specific Training

NOC staff

In this context, the NOC staff participates in the outsourced service provider's or internal service manager's incident management and resolution process, and can be assigned to deliver proactive remote patching, updating and monitoring services for devices, operating systems, applications software and services in client environments. Whereas the Service Desk

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staff works primarily with end user issues, the NOC staff's main focus is on managing and delivering scheduled maintenance activities to critical devices and responding to alerts generated by the provider's Remote Monitoring and Management solution.

The NOC staff identifies, prioritizes and documents all service activity and will execute the outsourced service provider's or internal service manager's incident management and resolution processes as well as utilize the provider's chosen software and hardware management and remediation tools, processes and procedures during remote service delivery.

In addition to the general training requirements for all technical staff previously mentioned, at a minimum, all NOC staff will need specific training in these areas:

- Problem management and resolution
    - Incident Management
    - Problem Management
    - Configuration Management
    - Change Management
    - Risk Management
    - Release Management
    - Service Level Management
    - Availability Management
    - Capacity Management
    - Service Continuity Management

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- o   Security Management
- o   Communication Management
- Remote Monitoring and Management
    - o   Installing agents
    - o   Configuring thresholds
    - o   Configuring alerts
    - o   Developing scripts
    - o   Incident Management
    - o   Problem Management
    - o   Configuration Management
    - o   Change Management
    - o   Risk Management
    - o   Release Management
    - o   Service level management
    - o   Availability Management
    - o   Capacity Management
    - o   Service Continuity Management
    - o   Security Management
    - o   Communications Management
- Day to day service delivery
    - o   Receiving all incident notifications and service requests
    - o   Recording all incidents and service requests
    - o   Classifying all incidents and service requests
    - o   Prioritizing all incidents and service requests
    - o   Troubleshooting all incidents and service requests
    - o   Escalating all incidents and service requests as necessary to maintain SLA

- o Maintaining consistent communication with all parties affected by the incident or service request
  - o Performing all scheduled maintenance activities
  - o Reporting on all activities
- Customer service
  - o Customer management
  - o Setting and adjusting expectations
  - o Phone etiquette
  - o Utilizing the "hold" or "mute" button effectively
  - o Follow-up and follow-through

Service Desk staff

In this context, the Service Desk staff participates in the outsourced service provider's or internal service manager's incident management and resolution process, and can be assigned to deliver remote technical support services to end users. The Service Desk staff identifies, prioritizes and documents all service requests, and initiates incident management and resolution activity.

Service desk staff will execute the outsourced service provider's or internal service manager's incident management and resolution processes as well as utilize the provider's chosen software and hardware management and remediation tools, processes and procedures during remote technical service delivery.

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In addition to the general training requirements for all technical staff previously mentioned, at a minimum, all Service Desk staff will need specific training in these areas:

- Problem management and resolution
    - Incident Management
    - Problem Management
    - Configuration Management
    - Change Management
    - Risk Management
    - Release Management
    - Service Level Management
    - Availability Management
    - Capacity Management
    - IT Service Continuity Management
    - Security Management
    - Communication Management
- Day to day service delivery
    - Receiving all incident notifications and service requests
    - Recording all incidents and service requests
    - Classifying all incidents and service requests
    - Prioritizing all incidents and service requests
    - Troubleshooting all incidents and service requests
    - Escalating all incidents and service requests as necessary to maintain SLA

- - - - - - - -

- Maintaining consistent communication with all parties affected by the incident or service request
- Performing all scheduled maintenance activities
- Reporting on all activities
- Customer service
  - Customer management
  - Setting and adjusting expectations
  - Phone etiquette
  - Utilizing the "hold" or "mute" button effectively
  - Follow-up and follow-through

Service Dispatchers

In this context, the service dispatcher participates in the outsourced service provider's or internal service manager's incident management and resolution process, and assigns resources to and schedules all services. The service dispatcher may also be included in the provider's escalation process and be alerted by their PSA solution should service requests become in danger of falling out of SLA.

Service dispatchers will utilize the provider's chosen software management tools, processes and procedures to manage dispatch functions during technical service delivery.

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In addition to the general training requirements for all technical staff previously mentioned, at a minimum, all service dispatchers will need specific training in these areas:

- Problem management and resolution
  - Incident Management
  - Problem Management
  - Configuration Management
  - Change Management
  - Risk Management
  - Release Management
  - Service Level Management
  - Availability Management
  - Capacity Management
  - IT Service Continuity Management
  - Security Management
  - Communication Management
- Day to day service delivery
  - Managing all incident notifications and service requests
  - Monitoring all incidents and service requests for proper escalation as necessary to maintain SLA
  - Managing consistent communication with all parties affected by the incident or service request
  - Scheduling all maintenance activities
  - Reporting on all activities

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Chapter 7

Contents

*As always, every form, tool and piece of collateral discussed in this book is available as a download after registration at: **www.mspu.us/nocbookregistration**.*

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Section 7: NOC and Service Desk Management by the Numbers

In order to reduce costs, improve performance and efficiencies and drive more profit to the bottom line, best in class service providers utilize a means to regularly measure the performance of the NOC and Service Desk. This measurement must focus on capturing *meaningful data* and displaying it in a simple to understand manner. This data will become the Key Performance Indicators by which performance will be measured, goals set against and bonuses and commissions designed and implemented to help realize.

After determining the meaningful data to collect, performance reports can be created to report on this data. These performance reports will be produced and reviewed on a regular basis by the outsourced service provider or internal service manager and their NOC and Service Desk managers.

Section 7: NOC and Service Desk Management by the Numbers

The first time this KPI data is reported, it must be analyzed to determine a baseline – what is the NOC and Service Desk's performance today? Through this analysis, a true understanding of performance can be realized, which may directly contradict perceived performance up to this point. There are several areas the outsourced service provider or internal service manager and their NOC and Service Desk managers should focus on, but at a minimum should include:

- Financial performance
- NOC performance
- Service Desk performance

Measuring Financial Performance

Measuring financial performance will provide the following information to the outsourced service provider or internal service manager:

- Revenue by product or service sold
- Cost of goods sold by product or service
- Gross margin by product or service sold
- Operating expenses
- Pre-tax net income

Many service providers tend to aggregate all services such as break-fix, time and materials, projects, managed services (including NOC and Service Desk), hosting and license renewals and others into one line item in their accounting system's chart of accounts: service revenue. Setting up the chart of accounts in this manner hampers the ability to understand how well or poorly any individual product or service is financially performing.

Paul Dippell from Service Leadership Inc. (www.service-leadership.com); an advisory firm that specializes in growth, performance and M&A strategies for the IT industry, characterizes this scenario as one of having a relay team of four runners. In this example, each runner represents one deliverable such as break-fix services, project services, managed services, and other services.

While the relay team finishes the race with a total time of two minutes and thirty seconds, because the individual split time for each runner is not being measured, it is impossible to determine how fast or slow each runner ran their portion of the race. This prevents the coach from knowing how to improve each individual runner's performance.

The same holds true with outsourced service providers or internal service managers that cannot determine the performance of their individual services in terms of cost, revenue and net profit. The first step in gaining visibility into these areas is to separate the individual revenue streams, their costs and gross margins. Only after this has been done can more meaningful analysis begin.

When evaluating financial performance, special attention should be paid to the differential between the cost of goods sold (COGS) and gross margin (GM) for each product or service sold or delivered; along with their individual contribution to gross revenue, to determine performance and profitability. In addition, a careful review of sales, general & administrative expenses (SG&A), will help identify opportunities to reduce costs in these areas.

Once the outsourced service provider's or internal service manager's financial chart of accounts has been normalized in this fashion, they can develop strategies to continually

improve net profits, utilizing regular financial reporting and benchmarking to attain this goal by running their organization by the numbers.

Visit MSP University's website at www.mpsu.us/en/tools to download the Service Leadership Index Fundamental Diagnostic Report© to help you diagnose your financial performance effectively and develop prescriptive actions to improve net profits.

Measuring NOC Performance

Measuring NOC performance will provide the outsourced service provider or internal service manager and their NOC manager and staff a clear indicator of performance. Measuring this performance will establish a baseline for improvement, allowing goals for improvement to be set, and bonuses and commissions developed to help incent this improvement.

Key NOC performance indicators that the outsourced service provider or internal service manager will measure may include:

- Total ticket load per day/week/month/quarter/year
- Total ticket load per queue per day/week/month/quarter/year
- Total ticket load per client/location/contract per day/week/month/quarter/year
- Total ticket load per resource per day/week/month/quarter/year
- Average time to resolution per day/week/month/quarter/year
- Average time to resolution per queue per day/week/month/quarter/year

- Average time to resolution per resource per day/week/month/quarter/year
- Average time to resolution per client/location/contract per day/week/month/quarter/year
- Average time to response per day/week/month/quarter/year
- Average time to response per queue per day/week/month/quarter/year
- Average time to response per resource per day/week/month/quarter/year
- Average time to response per client/location/contract per day/week/month/quarter/year
- Total tickets closed per day/week/month/quarter/year
- Total tickets closed per queue per day/week/month/quarter/year
- Total tickets closed per resource per day/week/month/quarter/year
- Total tickets closed per client/location/contract per day/week/month/quarter/year
- Total "Repeat" tickets per day/week/month/quarter/year
- Total "Repeat" tickets per queue per day/week/month/quarter/year
- Total "Repeat" tickets per resource per day/week/month/quarter/year

- Total "Repeat" tickets per client/location/contract per day/week/month/quarter/year
- Adherence to SLA % per day/week/month/quarter/year
- Adherence to SLA % per queue per day/week/month/quarter/year
- Adherence to SLA % per resource per day/week/month/quarter/year
- Adherence to SLA % per client/location/contract per day/week/month/quarter/year
- Top Clients with the most open tickets per day/week/month/quarter/year
- Total Cost of Service Delivery per day/week/month/quarter/year
- Total Cost of Service Delivery per queue per day/week/month/quarter/year
- Total Cost of Service Delivery per client/location/contract per day/week/month/quarter/year
- Total Cost of Service Delivery resource per day/week/month/quarter/year
- Utilization per day/week/month/quarter/year
- Utilization per queue per day/week/month/quarter/year

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- Utilization per client/location/contract per day/week/month/quarter/year
- Utilization per resource per day/week/month/quarter/year
- Realization per day/week/month/quarter/year
- Realization per queue per day/week/month/quarter/year
- Realization per client/location/contract per day/week/month/quarter/year
- Realization per resource per day/week/month/quarter/year
- Profitability per day/week/month/quarter/year
- Profitability per queue day/week/month/quarter/year
- Profitability per client/location/contract per day/week/month/quarter/year
- Profitability per resource per day/week/month/quarter/year
- Client satisfaction per day/week/month/quarter/year
- End user satisfaction per day/week/month/quarter/year
- Resource satisfaction per day/week/month/quarter/year

Measuring Service Desk Performance

Measuring Service Desk performance will provide the outsourced service provider or internal service manager and their Service Desk manager and staff a clear indicator of performance. Measuring this performance will establish a baseline for improvement, allowing goals for improvement to be set, and bonuses and commissions developed to help incent this improvement.

While similar to key NOC performance indicators, with additional metrics included for verbal interaction with clients and end users, key Service Desk performance indicators that the outsourced service provider or internal service manager will measure may include:

- Average speed of call answer per day/week/month/quarter/year
- Average speed of call answer per queue per day/week/month/quarter/year
- Average speed of call answer per resource per day/week/month/quarter/year
- Average speed of call answer per client/location/contract per day/week/month/quarter/year

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- Average call wait time per day/week/month/quarter/year
- Average call wait time per queue per day/week/month/quarter/year
- Average call wait time per resource per day/week/month/quarter/year
- Average call wait time per client/location/contract per day/week/month/quarter/year
- Average first call resolution per day/week/month/quarter/year
- Average first call resolution per queue per day/week/month/quarter/year
- Average first call resolution per resource per day/week/month/quarter/year
- Average first call resolution per client/location/contract per day/week/month/quarter/year
- Total ticket load per day/week/month/quarter/year
- Total ticket load per queue per day/week/month/quarter/year
- Total ticket load per client/location/contract per day/week/month/quarter/year
- Total ticket load per resource per day/week/month/quarter/year

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- Average time to resolution per day/week/month/quarter/year
- Average time to resolution per queue per day/week/month/quarter/year
- Average time to resolution per resource per day/week/month/quarter/year
- Average time to resolution per client/location/contract per day/week/month/quarter/year
- Average time to response per day/week/month/quarter/year
- Average time to response per queue per day/week/month/quarter/year
- Average time to response per resource per day/week/month/quarter/year
- Average time to response per client/location/contract per day/week/month/quarter/year
- Total tickets closed per day/week/month/quarter/year
- Total tickets closed per queue per day/week/month/quarter/year
- Total tickets closed per resource per day/week/month/quarter/year
- Total tickets closed per client/location/contract per day/week/month/quarter/year
- Total "Repeat" tickets per day/week/month/quarter/year

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What's on the Download?

- Total "Repeat" tickets per queue per day/week/month/quarter/year
- Total "Repeat" tickets per resource per day/week/month/quarter/year
- Total "Repeat" tickets per client/location/contract per day/week/month/quarter/year
- Adherence to SLA % per day/week/month/quarter/year
- Adherence to SLA % per queue per day/week/month/quarter/year
- Adherence to SLA % per resource per day/week/month/quarter/year
- Adherence to SLA % per client/location/contract per day/week/month/quarter/year
- Top Clients with the most open tickets per day/week/month/quarter/year
- Total Cost of Service Delivery per day/week/month/quarter/year
- Total Cost of Service Delivery per queue per day/week/month/quarter/year
- Total Cost of Service Delivery per client/location/contract per day/week/month/quarter/year
- Total Cost of Service Delivery resource per day/week/month/quarter/year

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- Utilization per day/week/month/quarter/year
- Utilization per queue per day/week/month/quarter/year
- Utilization per client/location/contract per day/week/month/quarter/year
- Utilization per resource per day/week/month/quarter/year
- Realization per day/week/month/quarter/year
- Realization per queue per day/week/month/quarter/year
- Realization per client/location/contract per day/week/month/quarter/year
- Realization per resource per day/week/month/quarter/year
- Profitability per day/week/month/quarter/year
- Profitability per queue day/week/month/quarter/year
- Profitability per client/location/contract per day/week/month/quarter/year
- Profitability per resource per day/week/month/quarter/year
- Client satisfaction per day/week/month/quarter/year
- End user satisfaction per day/week/month/quarter/year
- Resource satisfaction per day/week/month/quarter/year

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The outsourced service provider's or internal service manager's NOC and Service Desk managers should be able to pull the data required to report on these metrics from their Professional Services Automation solution when integrated with their Remote Monitoring and Management tool, their Communications solution and the results of customer satisfaction surveys, in order to identify, evaluate and improve upon these service delivery KPIs.

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What's on the Download?

- Customer service
    - Customer management
    - Setting and adjusting expectations
    - Phone etiquette
    - Utilizing the "hold" or "mute" button effectively
    - Follow-up and follow-through

NOC Managers

In this context, the NOC manager is ultimately responsible for maintaining the outsourced service provider's or internal service manager's NOC staffing levels, training and certification requirements, incident management and resolution processes and client satisfaction by strict SLA management, among other responsibilities. NOC managers will utilize the provider's chosen software management tools, processes and procedures to manage service delivery.

In addition to the general training requirements for all technical staff previously mentioned, at a minimum, all Service Desk managers will need specific training in these areas:

- Problem management and resolution
    - Incident Management
    - Problem Management
    - Configuration Management
    - Change Management
    - Risk Management

What's on the Download?

- Release Management
- Service Level Management
- Availability Management
- Capacity Management
- Service Continuity Management
- Security Management
- Communication Management
- Remote Monitoring and Management
  - Installing agents
  - Configuring thresholds
  - Configuring alerts
  - Developing scripts
  - Incident Management
  - Problem Management
  - Configuration Management
  - Change Management
  - Risk Management
  - Release Management
  - Service level management
  - Availability Management
  - Capacity Management
  - Service Continuity Management
  - Security Management
  - Communications Management
- Day to day service delivery
  - Receiving all incident notifications and service requests
  - Recording all incidents and service requests
  - Classifying all incidents and service requests

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Chapter 8

Contents

As always, every form, tool and piece of collateral discussed in this book is available as a download after registration at: www.mspu.us/nocbookregistration.

Section 8: Outsourcing NOC and Service Desk Components

With the advent of affordable, 3rd-party back office NOC and Service Desk organizations, the outsourced service provider or internal service manager has the opportunity to scale their services to a much broader range of clients, and prolong the necessity to hire, train and manage internal full-time staff. This allows a consistent support experience for clients and end users and in many cases increases the provider's profitability due to the low cost of these services. In addition, these organizations can private-label their services, and represent the outsourced service provider's or internal service manager's organization throughout all communications and incident management and resolution activities.

Benefits of Outsourcing
Benefits to engaging with a 3rd-party NOC or Service Desk provider may include:

- The ability to scale services broadly and quickly
- Improve performance metrics
- Utilize highly-skilled and costly internal resources for more profitable tasks and activities

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- Increase customer satisfaction through improved, consistent KPIs
- Increase net profits by lowering costs

Considerations Prior to Outsourcing

When exploring outsourcing components of the NOC or Service Desk to a 3rd-party provider, among other concerns, the outsourced service provider or internal services manager may consider:

- The 3rd-party provider's location
- The 3rd-party provider's qualifications and experience
- The 3rd-party provider's business structure and time in business
- The 3rd-party provider's solvency
- The 3rd-party provider's tools and technology and ability to integrate with the provider's existing solutions
- The 3rd-party provider's NOC and Service Desk delivery and management processes
- The 3rd-party provider's training and support offerings
- The 3rd-party provider's customer service philosophy
- The 3rd-party provider's privacy policy
- The 3rd-party provider's culture and native language
- The 3rd-party provider's SLA and KPIs

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- The 3rd-party provider's customer satisfaction rating
- The 3rd-party provider's pricing and payment model
- The 3rd-party provider's ability to private label their services and represent themselves as the provider
- The 3rd-party provider's perception in the industry

In addition, the outsourced service provider or internal service manager may request an NDA from the 3rd-party provider prior to negotiating at a deep level where internal and client-specific information may be shared.

What to Outsource

Industry statistics reflect that best in class Service Desks close 90% of service requests with Tier 1 resolution in less than an hour. That means that only 10% of all service requests are escalated to Tier 2 and beyond. Let's assume that 7% of all service requests are escalated to Tier 2, with the remaining 3% ending up in Tier 3.

This means that if the outsourced service provider or internal service manager outsourced their Tier 1 and Tier 2 service requests to a 3rd-party Service Desk, they may potentially reduce their incoming ticket load by up to 97%.

Imagine the potential impact that this has on the ability to repurpose or eliminate internal staff as a result. If highly-skilled, costly internal staff can be reassigned to focus on

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higher-value, higher-visibility and more profitable services, this is a beneficial outcome. And if some costly internal staff can be released, this can also improve net profits.

Outsourcing NOC services to a 3rd-party organization can have similar positive outcomes for the outsourced service provider or internal service manager, and when both Service Desk and NOC services are outsourced to the same 3rd-party provider, this reduces complexity and costs over time, as all NOC and Tier 1 and Tier 2 service delivery activity is conducted by a sole provider. This eases integration, escalation, reporting, communication between, and overall management of the relationship and service outcomes.

The outsourced service provider or internal service manager may outsource:

- Tier 1 and 2 NOC and Service Desk functions

What to Keep
When outsourcing components of the NOC and Service Desk and transferring the role of the single point of contact to a 3rd-party provider, the outsourced service provider or internal service manager would be well advised to monitor and manage the Professional Services Automation solution to insure all service requests are prioritized, assigned and escalated by the 3rd-party provider in adherence with SLAs.

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The outsourced service provider or internal service manager should also keep all Tier 3 service requests; as these are normally the most visible, high-value incidents from a client perspective, allowing the appropriate sensitivity and attention to be directed to these incidents as quickly as possible by the outsourced service provider or internal service manager. In this scenario, all Tier 3 escalations will be assigned to the outsourced service provider's or internal service manager's staff by the 3rd-party provider.

The outsourced service provider or internal service manager will also want to retain management of all vendors supporting their clients or end users and their activity. This again is a highly-visible, high-value activity that requires sensitivity and direct attention.

The outsourced service provider or internal service manager may keep:

- Monitoring and management of the service board/dispatch portal
- Tier 3 escalations
- Vendor management

Integration
The more tightly integrated the 3rd-party NOC and Service Desk provider's systems and solutions are with the outsourced

service provider's or internal service manager's, the more efficient and effective service delivery, visibility and reporting will be. Since reporting is so important in terms of KPI management and utilized to reflect service value to end clients by the outsourced service provider or internal service manager, the tighter the integration between these systems, the easier it will be to aggregate the necessary performance data to generate these critical reports.

Transitioning Clients

It will be simpler to on-board new clients or end users to the 3rd-party NOC and Service Desk provider as the single point of contact than it will existing clients and end users. The reason for this is simple – new clients' and end users' expectations can be set appropriately during pre-sales, on-boarding and service turn-up, or go-live to understand and accept the integrated service delivery process. Existing clients and end users; however, are a different story, as they are being asked to accept a change to an unknown experience, and are comfortable with the existing outsourced service provider's or internal service manager's processes, staff and deliverables.

When transitioning existing end users or clients to a 3rd-party provider, it is imperative for the outsourced service provider or internal service manager to reflect a better experience for them to the decision maker. Some points to impress to the

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client or end user by the outsourced service provider or internal service manager may include:

- The relationship, management and monitoring of all service delivery processes and KPIs will be retained by the outsourced service provider or internal service manager
- Tier 3 escalations will be retained by the outsourced service provider or internal service manager
- Vendor management responsibilities will be retained by the outsourced service provider or internal service manager
- A more consistent service delivery experience will be delivered to the end users or client
- Speedier call response will be delivered to the end users or client
- Increased first call closure will be delivered to the end users or client
- Increased customer satisfaction will be delivered to the end users or client
- The outsourced service provider or internal service manager will be free to focus on more high-value services for end users or clients that help them achieve their business goals

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A final consideration for the outsourced service provider or internal service manager to keep in mind when engaging with a 3rd-party provider is that their NOC and Service Desk Managers' roles will shift from managing internal resources to managing external ones, along with the relationship with the 3rd-party provider. This added responsibility will add substantially to the NOC or Service Desk Managers' duties, as it is always challenging to manage an outsourced, geographically displaced group of people. In order to achieve success in this endeavor, the NOC or Service Desk Manager must over-communicate with the 3rd-party provider and their staff, and continuously monitor their PSA solution's service board or management portal to insure the 3rd-party provider's staff is delivering services competently and adhering to SLAs.

A heavy emphasis on customer satisfaction activity is recommended when using a 3rd-party NOC and Service Desk provider, including conducting face-to-face and anonymous electronic surveying, as well as outsourced 3rd-party telephone survey activities.

- o Prioritizing all incidents and service requests
- o Troubleshooting all incidents and service requests
- o Escalating all incidents and service requests as necessary to maintain SLA
- o Maintaining consistent communication with all parties affected by the incident or service request
- o Performing all scheduled maintenance activities
- o Reporting on all activities
- Customer service
  - o Customer management
  - o Setting and adjusting expectations
  - o Phone etiquette
  - o Utilizing the "hold" or "mute" button effectively
  - o Follow-up and follow-through

Service Desk Managers

In this context, the Service Desk manager is ultimately responsible for maintaining the outsourced service provider's or internal service manager's Service Desk staffing levels, training and certification requirements, incident management and resolution processes and client satisfaction by strict SLA management, among other responsibilities. Service Desk managers will utilize the provider's chosen software management tools, processes and procedures to manage service delivery.

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  - Problem Management
  - Configuration Management
  - Change Management
  - Risk Management
  - Release Management
  - Service Level Management
  - Availability Management
  - Capacity Management
  - IT Service Continuity Management
  - Security Management
  - Communication Management
- Day to day service delivery
  - Responsible for managing all technical staff
  - Responsible for managing all service delivery
  - Responsible for managing all client expectations
  - Responsible for reporting on all activities
- Customer service
  - Staff management
  - Customer management
  - Setting and adjusting expectations
  - Follow-up and follow-through

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