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Q: **How do I quantify the resources needed to run my Service Desk from a cost efficient standpoint and still provide the expected service levels to our customers?**

A: There are a couple of different ways to do that, from an effectiveness and efficiency standpoint, as well as utilization of resources. The main question of how much do we utilize our service desk representatives can be answered with the following formula. We don't want to over utilize them, if we keep them on the phones for too long a period, they will tend to burn out quickly. If we're our people on phones between 80-90% of the time, it's way too high.

$$\text{Agent Utilization} = \frac{(500 \text{ contacts/month}) \ X \ (10 \text{ minutes/call})}{(21 \text{ working days per month}) \ X \ (7.5 \text{ work hours per day}) \ X \ (60 \text{ minutes/hr})} = 52.9\%$$

Your service desk representatives should be on the phones about 53% of the time. The rest of the time, we should be letting our analysts complete the records they have create, doing training, updating the CMDBs, staff meetings, etc. All of these aspects of their job should be taken into consideration.

The other thing we look at, when we are talking about effectiveness/efficiency of our service desks, is where are the calls actually being resolved? Is this happening at tier1/tier2/tier3? In general, we look at those costs, and if you're resolving incidents at tier 1 – cost is $25, tier 2 – $42, tier 3 – $130 to150$. Whereas utilizing an outside vendor can cost as much as $450.00 per resolution. You can use these numbers and took a look at "where incidents were being resolved?" Are the majority of the issues being taken care of by a third party vendor at the cost of $450.00 per incident? Then the goal would be to move those from the vendor to tier 1-2 groups. In my previous role, we did just that. As our process matured we became more successful at creating that change and saved over $800,000.00 over a two year period.

Q: For the Incident Categories, how many/what types of categories do you recommend?

A: Categories are one of those things that are unique to each organization, so it depends on what kind of services you're offering, how you're set up, but categorization is really critical. ITIL recommends that you don't go above 4-8 different types of categories: Service, System, Application, Environment, Database, CI, etc. It's very important that if you find things are being miss-categorized at the beginning of an incident record, you will need to re-categorize them at the close of the incident. Many tools allow for this function. You can always do a brainstorming/white boarding session with your team to figure out your categories.

Q: **What advice do you have for a major incident procedure, especially regarding responsibilities during multiple functional escalations?**

A: Major incidents are incidents that have major impact to the environment and it is critical, that the incident much be escalated more quickly, and more resources must be brought to bear on the incident resolution at a faster rate than a normal incident. Therefore it is imperative that you have the ability to do parallel escalations to different groups all at the same time. Having incident models will really help. Being able to predefine the activities that need to take place, utilizing a RACI matrix defining who will be accountable and responsible when a major incident happens, allows the service organization to respond more rapidly and therefore enabling faster resolution times.

Q: How many calls were received in a year?

A: It was in the neighborhood of 300,000 a year. (Drew's previous job, which he referenced.)

Q: With parallel escalations, how do you avoid "finger pointing" between groups?

A: You're always going to get that finger pointing between groups, the best thing we can do is every group has to do their due diligence, you don't have to prove your innocent, but you also have to prove that you're not guilty. We have to try and make sure that every group is doing what it's supposed to. It's critically important to make sure that all of the information/lessons that get learned from the incident get recorded, so that way we can look back and see what happens when similar incidents happen again. Using Operational Level Agreements (OLAs) can also help with this.

Q: did you come up with categories or types for incidents; were they at the enterprise level?

A: We had some categories at the enterprise level, and some categories, we started at an enterprise level and had subcategories underneath that.

Q: You began to accept that you were the feeding ground for IT, you really allowed for a path of career advancement, can you talk about the policy you put in place and how you morphed from a "don't you dare" to a "here you are"

A: It started with one of the owners of financial applications. His team of developers came in to work with the service desk staff to do training on a new product that was being release. From training the service desk received the tier 1 and tier 2 groups were able to answer 95% of the questions coming in during early life support. The developers from the financial team found some really smart people on the service desk, and quickly said "I would like to take these people…" From that we developed a policy on how and when you could move into other areas of the IT organization. This included specific goals and objectives and if these where met and an opening was available you got to move. Part of the program was that the service desk analysts could pick their area of expertise (network, applications, database, processes etc.) They would interview with the support team they were interested in joining and if it worked out, we then would start them on a training program. This could take the form of a couple days a month, one day a week depending on the work volume of the service desk and the target support team. They would then have very specific goals and objectives there, and as they met them, and as positions opened up, they could move on. Over a 9 year period, about 40 people moved through the organization. Then, originally coming from the service desk, these people understood how important the service desk was.