



Help Desk vs. Service Desk: Which One is Right for You?

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Executive Summary

The IT support center industry has grown up and come into its maturity in the past thirty years, starting with the introduction of the PC in 1981. Early help desks (circa 1985) were known as the helpless desk for good reason – they were staffed by poorly trained employees who had access to none of the tools that a twenty-first century service desk now enjoys. The Information Technology Infrastructure Library® (ITIL®) was first developed in reaction to the immature state of IT in the late 1980's, and this set of best practices introduced the concept of an integrated service desk that is the single point of contact for all IT-related customer inquiries.

Although the names are sometimes still used interchangeably, the help desk and the service desk are distinctly different. The help desk is an effective support center that assists customers in maximizing their use of technology. Help desks provide high levels of technical service with a focus on incident management, asset management and basic change management. In contrast, the service desk is not only dedicated to providing excellent technical support but is tightly coupled with all of the IT processes and concentrates on the business needs of the customer and the enterprise. It is possible to assess your support center according to the differing characteristics of a help desk and a service desk and decide which approach best describes your organization.

It is also possible to assess your support center against a maturity model. Organizations such as the Software Engineering Institute and HDI® (formerly, Help Desk Institute®) have created maturity models for their industries. In this white paper, Numara Software introduces its own maturity model, called the IT Process Maturity Model, which helps managers assess the maturity of their organizations and provides a roadmap or framework for organizations aspiring to improve their operations.

Before choosing an appropriate incident management system for the support center, an astute manager will perform an operational self-assessment. Determining if the support center is a help desk or service desk according to the functions it performs is the first step of a self-assessment. The second step is to determine into which quadrant of the maturity model the support center fits currently, and/or into which quadrant it hopes to develop into. It is important not to become infatuated with advanced features and functions that the support center does not currently need or will not need in the foreseeable future. Because there are so many choices in today's market for incident management systems, it is important to approach this important decision with as much knowledge of the market – and knowledge of where your support center fits into industry models – as possible.

This white paper is intended to help support center managers self-assess their center's primary functions and maturity level in order to choose an incident management system that best fits their needs without wasting money on features that will not be used.

An Historical Perspective Of The Service Desk Industry

The service desk has come a long way since its infancy in the 1980's. With the introduction of the personal computer in 1981, corporate users began to have, at their fingertips, computing power that was once confined to the data center. Client/server applications leveraged the power of the PC and put greater capabilities into the customer's hands. The help desk was born out of the need to help users maximize use of their technology tools and fix problems as they occurred.

Early help desks were not glamorous places. They were staffed with entry-level employees who knew little about the technology they were supporting. These help desks had little technology, no processes and a sketchy relationship with the rest of the Information Technology (IT) organization.

It didn't take long for smart minds in the industry to devise better ways to serve customers. Consistent call-handling processes were designed, telephony and computer-based tools were created to record and track calls that arrived at the help desk, and help desk managers began to work more closely with other groups within IT. The help desk began to add value to the organization, solving more issues independently and efficiently in order to maximize customer's productivity.

In 1989, the government of the United Kingdom, along with representatives from the IT industry, published the original Information Technology Infrastructure Library, or ITIL. This set of best practices introduced the concept of a service desk, a new generation of help desk that is tightly integrated into the overall working of the IT organization and the business. Since its introduction, ITIL has had several major revisions, bringing us up to the current version three, which was released in the spring of 2007.

Differences Between A Help Desk And A Service Desk

Today, the name help desk or service desk doesn't necessarily describe the type of support center it is. As Jayne Groll, President of ITSM Academy (a US-based ITIL training organization) notes, "A service desk is not just a help desk with a new name." Instead, according to ITIL, the service desk handles a range of services, acting as the single point of contact for not only incidents, but also change requests, the forward schedule of changes, problem management and configuration changes. Groll states that the differentiator between a help desk and a service desk is a services orientation. In ITIL, a service is one or more IT systems that enable a business process. A services orientation moves the service desk away from providing incident management for technical issues to providing integrated support that considers the business impact of every issue. It is important to note that moving to a services orientation is an executive business decision, and may not be the best direction for some organizations, as we shall see.

Help Desks

A help desk provides excellent incident management, ensuring that all customer issues are resolved in a timely and orderly manner that does not allow tickets to get lost. Typically, a help desk has access to asset management data (information about IT assets, including hardware and software) and assists in keeping asset information up-to-date. A help desk uses an effective method to create and maintain knowledge and might offer web-based self-help functionality to customers, such as access to the support knowledge base. A help desk may have a Service Level Agreement

that is technology-oriented rather than business-oriented. The help desk may or may not see the need to create Operating Level Agreements with other IT groups. (Operating Level Agreements are the internal contracts between a help desk and its support partners, such as application support or network administration. The agreement includes operational promises such as response and resolution time to escalated tickets, communication methods between the groups and reporting requirements.) The change management process in this IT organization may be informal but highly effective. Oftentimes the IT organization is small and help desk personnel will multi-task and perform duties that in a larger organization would be assigned to dedicated employees. When multiple roles are performed by a single person, there is less need for formal processes, meetings and oversight.

Quick Reference: ITIL Definitions

Change Management: The formal process of accepting change requests, prioritizing, testing and implementing them in a controlled manner.

Configuration Items: Elements of software, infrastructure and documentation.

Configuration Management: Provides information about all assets and configuration items. Provides information about the relationship among configuration items.

Incident Management: The process to restore the customer to a productive state as quickly as possible.

Operating Level Agreement: The agreement between the Service Desk and its internal support partners regarding how they will work together.

Problem Management: The process of identifying the root cause of incident(s) and eliminating the cause to prevent future incidents.

Service Level Agreement: The document that describes the services and expectations of customers as they use IT services

Service Desks

A service desk is created when business executives identify the need for a services orientation in the IT department, which integrates IT into the fabric of the business. It also assumes that the organization's executives have embraced ITIL as the framework for its operations. In a nutshell, the service desk deals with more complexity and more formalized, integrated processes than a help desk. The service desk is the single point of contact for all IT-related customer requests and is the face of IT to the customer. The service desk provides incident management, the goal of which is to restore the customer to a productive state as quickly as possible, either through education, resolution or a work-around. At the same time, the service desk is tightly integrated into many IT processes, including problem management (the process of identifying the root cause of reported problems), change management (the methodology to make orderly changes to the IT infrastructure) and configuration management¹ (the means to record asset information plus the relationships among them). A service desk is part of an IT organization that maintains a Configuration Management Database (CMDB) or a repository for all configuration data. Customers contact the service desk to report change requests and to ask questions about planned changes. The service desk communicates the forward schedule of changes to the customer community, and represents the voice of the customer on the Change Advisory Board. The service desk participates in the creation, implementation and maintenance of the Service Level Agreement and Operating Level Agreements.

¹ Although asset management and configuration management share a similar goal of maintaining a current inventory of IT assets, configuration management goes the additional step of recording the relationships and links between all assets.

To help differentiate between help desks and service desks, use the following questions to decide which describes your operations most closely:

- ❖ Do you provide excellent technical support, helping customers to solve problems efficiently and effectively?
- ❖ Do you provide a single point of contact for all technical issues?
- ❖ Do you make changes to the IT infrastructure in an effective manner, but the method is informal and could be different according to the nature of the change?
- ❖ Do your support analysts wear many hats and diagnose problems, find the root cause and work successfully with others in IT to solve the problem?
- ❖ Have you defined how you will offer technical support to your customers and communicated it to your customer base?
- ❖ Do you keep track of your IT assets and interface to your accounting system?

If you can answer yes to most of these questions, you probably operate a Help Desk!

- ❖ Do you provide excellent incident management, helping customers to return to productivity?
- ❖ Has your management embraced ITIL as the framework for IT processes?
- ❖ Does your support center participate in most IT processes, and has that participation been formally defined?
- ❖ Do you have a formal change management process and a Change Advisory Board?
- ❖ Do you have a group distinct from the support center that performs problem management?
- ❖ Have you defined a Service Level Agreement and published it to your customers?
- ❖ Do you keep track of your configuration items and the relationships among them in a Change Management Database?

If you can answer yes to most of these questions, you probably operate a Service Desk!

The size of the IT organization is not necessarily a good indicator of whether the support center is a help desk or a support center. Instead, what differentiates a service desk from a help desk is the breadth of functions in which it participates, its integration with ITIL processes, and its maturity.

Also, organizations that are drawn to ITIL processes tend to be more complex environments that require more complex business workflow and automation. This has an expense both in product cost and management of these complex processes that may not be required by organization with less complex processes to manage.

If your organization is operating effectively without implementing ITIL processes, don't complicate your environment by trying to adopt something that is inappropriate for the demands of your organization. Many organizations serve their customers in a highly effective manner without going to the trouble of adopting new processes or re-engineering what already works well.

Help Desks And Service Desks Within A Maturity Model

Many industries have created maturity models to create a developmental roadmap or framework for organizations aspiring to improve their operations, and as a means of assessing the maturity level of an organization. The Capability Maturity Model Integration® (CMMI®), created by the Software Engineering Institute, is a well-known model for software engineering organizations. Attainment of the highest designation (level 5) in this model denotes a highly optimized, highly effective software engineering organization. The support center industry has similar maturity models. HDI (formerly, Help Desk Institute) first created a Support Center Maturity Model in 2003 and updated it in 2008.

The benefits of using a maturity model are two-fold, according to Robert Last, Content Manager at HDI. "The first is it allows businesses to determine where it is on a maturity curve. The second is that it allows you to look at the quality of the support center to see if you are receiving a good cost-benefit."

In looking at a maturity model, managers should focus on the organization's overall goals. Executive management may decide that the support center does not need to operate at the highest level of a maturity model. The organization may be ably served by a proactive support center (stage two in the Numara Software maturity model, below), and anything more than that would be inappropriate for the organization's needs. In contrast, an organization whose IT processes are tightly coupled with the overall strategic success of the business may aspire to operating as a service- or value-focused IT department. Your goal on a maturity model should be a conscious business decision that takes into account return on investment, the strategic direction of the organization and internal organizational culture and expectations.

In this white paper, we introduce the Numara Software IT Process Maturity Model. The four levels of the Numara Software IT Process Maturity Model are summarized in the following paragraphs.

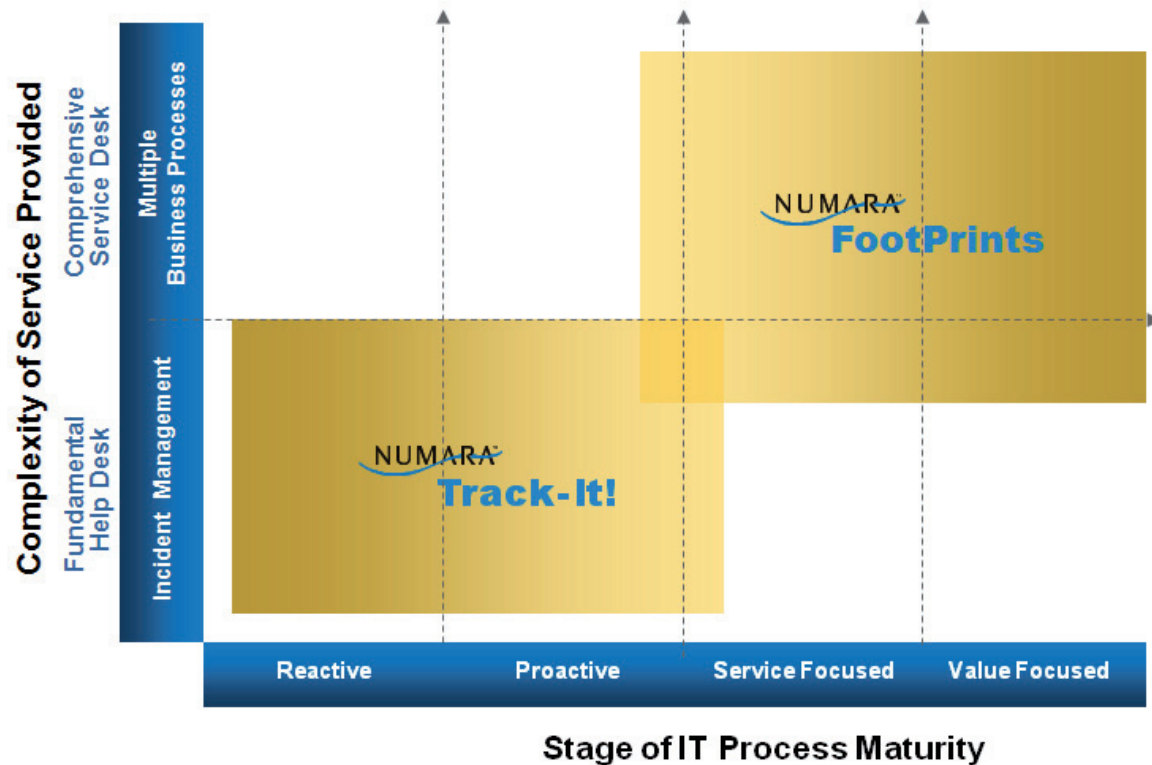
Reactive: These support centers are characterized by rudimentary incident management processes and the initiation of a problem management process. Processes are ad-hoc and not yet documented. These support centers have informal relationships with and loosely defined procedural links with the rest of IT. Often operating in a "fire fighting" mode, these young centers do not have resources to invest in more than the basic support tools. Some may be using paper-based or internally-developed incident management systems. Most reactive support centers aspire to become proactive because a proactive center provides better customer service.

Proactive: These centers are characterized by the implementation of highly functional telephony and incident management tools. They have defined and documented their incident management process, including tracking and escalating incidents and basic knowledge management. They focus on the efficiency of the support center by analyzing trends and monitoring metrics. This organization is linked to the rest of the IT organization through effective change, asset and problem management processes. They have several automated support processes, the capability to monitor system performance and basic web-based customer self-service. Managers have created basic service level agreements with customers.

Service Focused: These support centers have integrated tool sets that include a knowledge base linked to web-based customer self-service. These centers have developed and documented comprehensive support processes, including incident management, workforce management and knowledge management processes. Management is focused on the quality of service and understands the costs and benefits of providing it. These centers seek customer feedback on a regular basis and leverage that information to continually improve services and processes. Service level management includes guaranteed performance levels for the customer. Members of these organizations represent the voice of the customer in change, problem and release management and are fully involved in configuration management.

Value Focused: These centers enjoy fully developed suites of integrated tools that automate many support processes. Service level management is tied to business objectives, with an emphasis on preventative problem elimination and advanced support metrics. The service desk is fully integrated into all IT processes and operates as the single point of contact for all IT-related issues. IT's overarching purpose is to improve business processes, not just enable them. In partnership with business leaders, IT understands the business drivers and focuses on activities that increase the effectiveness and profitability of the enterprise.

The following graph shows how the Numara Software families of products, Numara Track-It and Numara FootPrints, fit into its IT Process Maturity Model. Although there is overlap between the two products, this graphic depicts both the maturity of and functionality provided by help desks and service desks and suggests the best fit.



Considerations In Selecting An Incident Management System

Help desks and service desks have many choices today when it comes to selecting an incident management system. The process of discerning the right tool and the right vendor for your unique needs can be overwhelming. Fortunately, with the information available in this white paper, you should be able to assess your needs more accurately.

The wise support center manager will start by performing a preliminary self-assessment of his or her operations. Using the guidance in the section above called "Differences between a Help Desk and a Service Desk", select the characteristics that most closely describe your operations. Don't expect your support center to fit neatly into one designation, but look for the closest fit. This is a good indication of whether you are a help desk or service desk.

Then, re-read the descriptions of the maturity model and make a quick mental assessment of what quadrant best describes your support center, or which quadrant your support center aspires to. This level of self-awareness helps immeasurably in determining the best fit for your incident management solution needs.

A tool that constitutes a good fit will have the capabilities that your support center needs right now and into the next two or three years. As long as your vendor's package works on top of a standard database, upgrading and converting to another system is always possible. Do not be mesmerized by capabilities and features that you don't need. For example, most help desks that are in the reactive and proactive stages of maturity do not need a lot of integration to other modules, highly customizable reports or the ability to implement a complex workflow.

Also consider the amount of implementation time and effort a system needs. Generally, the more customization that you demand of a system, the longer it will take to implement. If you are in the reactive or proactive quadrants of the maturity model, it is likely that you will require a more streamlined, less feature-rich system. Look for one that is easily implemented in a few days.

Lastly, as a support center manager yourself, you know the importance of being able to rely on a vendor's support center for assistance in running, configuring and maintaining a system. Don't be afraid to ask tough questions about the vendor's support center, such as:

- ❖ "What is the average speed of answer to support calls?"
- ❖ "What are the operating hours of the support center?"
- ❖ "What services are covered and not covered in my support agreement?"

Conclusion

Whether you operate a help desk or a service desk, the good news is that, in today's market, you can find an incident management system that very closely meets your needs. Remember, one size does not fit all! Be sure to assess how you function today, decide where you'd like to be on the maturity model in two to three years, and then purchase an incident management system that most closely matches your requirements. Although it is imperative that you plan for the future growth and development of your support center, resist the urge to buy features that sound good or that you think you might use

sometime in the future. Many times, those features remain unused forever. By following the thoughtful approach that is outlined in this document, you will increase the odds that the system you purchase is the perfect choice for your organization.

About The Author:

Kristin E. Robertson, President of KR Consulting, helps support centers increase their customer satisfaction and improve their efficiency. As a consultant, trainer, executive coach, published author and speaker, she has assisted companies such as AIG, Southwest Airlines, 7-Eleven, Inc., Hewlett Packard, Southwest Airlines, SBC Internet Services (now AT&T), Medtronic, Blockbuster, St. John's Regional Medical Center, and Jenkins & Gilchrist, PLC with their technical support and customer service needs. She is the author of *Spectacular Support Centers: Best Practices for Small to Mid-Sized Help Desks and Technical Support Centers* and its accompanying CD of templates and reports.

Ms. Robertson was a faculty member of HDI University for over five years, conducting certification training for both frontline analysts and managers. She also offers a curriculum of other support industry-related seminars and is a frequent speaker at conferences and meetings. As an auditor for Service Strategies Corporation's Service Capability & Performance Support Standard certification, she audits support centers for compliance with industry-accepted standards. She specializes in training and consulting on a knowledge management process called Knowledge-Centered Support (KCS), developed by the Consortium for Service Innovation. She has taught KCS classes internationally to hundreds of students and has assisted many companies in their KCS implementations.

Before starting her consulting service, Kristin served as an executive at software and financial services firms, managing technical support centers of up to 120 representatives. Employers included Fidelity Investments, Advent Software, Ross Systems, and Fleet Bank.

Resources:

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Who are we?

Numara Software is a leading provider of integrated IT management solutions for Desktop Management, PC Lifecycle Management, Security & Compliance, Help Desk and Service Desk. Designed to optimize IT management, Numara FootPrints and Numara Track-it! collectively support more than 50,000 customer sites and nearly 20 million IT assets worldwide.



freedom
to simply **choose**
the right solution for you