Tips for Establishing a Service Desk

1. Know the customer. Understand the needs and expectations of the group who will be using the service.
    a. Will the customer expect metrics reporting?
    b. When is the service desk available?
    c. What kind of information is needed to provide the expected service?
    d. What are the data elements that need to be tracked and where would that information be available?
    e. What is the patience level of the users, i.e. how long are they willing to wait for the incident record to be opened?
2. Make plans to train the Service Desk personnel. They should have well documented procedures and a full understanding of the customer needs and expectations. They should be well versed in the tool that is used to capture the incident record.
3. Understand the level and types of information to be tracked in the incident records for various severities of issues.
    a. What information can be automatically generated by the tool?
    b. What information must come from the user?
    c. What information can come from other systems or repositories?
    d. What other applications will need this information?
    e. What data elements should be available for easy searching through records?
    f. Can some incidents be efficiently tracked in a "Quick Ticket?"
    g. Will incidents need to be escalated to groups with greater expertise?
    h. Will incidents need to be escalated to higher levels of management for expediting?

4. Don’t skimp on reporting. It does no good to track information if there is no use for it later. It very quickly becomes “busy work.” Your very expensive system will become almost useless because of the lack of good solid information coming out of it.

    a. Plan for metrics reporting for internal use and external use. Internal reporting metrics like worker productivity will help manage the service. External reporting metrics on number of incidents of each severity handled, and speed will explain the value of the service to the paying customer.

    b. Plan for informational reporting. Problem Management will need copies of the incidents for root cause analysis. Manager may need to review the steps taken to solve the incident. Service Desk personnel may need to review steps taken in order to recommend new fixes.

5. Understand the difference between closing the incident record and resolving the incident. Resolving the incident means that service has been restored or a reasonable work-around has been put in place. The incident record should not be closed until the user agrees that the service has been restored. Your process should include a cost-effective way of getting agreement from the user.

6. The Service Desk personnel should own the incident from the initial recording to closure.