

Help Desk Services: A Business Case Roadmap

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If the cost and management resources of providing in-house technical help desk services are getting out of hand, or if help desk services are not a core competency of your business, you may want to consider sourcing your help or service desk business functions to a third party.

INTRODUCTION

This Business Case Roadmap will provide you with an overview, the functional elements, and the real-world examples you need to build a Business Case that will result in funding for your help desk initiative.

Utilizing a third party for your help desk services is typically a strategic business move. However, it is important to be wary of offshore services that can lead to subpar satisfaction. With all of the negative connotations and issues related to the offshore model, we will only focus on the onshore sourcing of your help desk services.

A dark blue circular callout box with a light green circle partially overlapping its top edge. It contains white text and the words 'BUSINESS CASE' in green.

Use this guide
to develop a strong
BUSINESS CASE
for leveraging a
Help Desk Services
provider.

OVERVIEW

The primary reasons to leverage an outside group for your help desk services include:

- Better Customer Service
- Increased Productivity
- Reduced Costs

The Business Case you are developing will speak to these primary business drivers, and provide evidence to justify them.

A strong Business Case includes these elements:

1. **Executive Summary**
2. **As-Is Service Model**
(How is it being done now)

EXECUTIVE SUMMARY

The purpose of this Business Case is to present compelling evidence that your business will benefit from third party Help Desk Services.

Due to the training and experience, constraints and limited funding of our current help desk services department, our customer service performance lags behind industry standards and we are receiving an increasing number of customer complaints.

3. **Current Problems and Issues**
(Include metrics and measurements)
4. **Current Business Impact**
(Customer-related, cost-related, etc.)
5. **To-Be Service Model**
(Define the new model and include SLAs and metrics)
6. **Proposal**
(What is being proposed that will solve the problems and issues)
7. **Cost Justification**
(Provide financial proof that outsourcing is a better solution)
8. **Conclusion**

Although we are doing the best we can with what we have, it has become apparent that outsourcing our help desk services is an option we need to review and assess.

We propose a Request for Proposal (RFP) be developed and to a select group of help desk providers.

The Executive Summary allows you to ‘roll-up’ the salient points of your Business Case.

THE COSTS AND BENEFITS OF AFTER-HOURS SUPPORT

Every business knows that customers and employees prefer 24/7 support, but the costs can skyrocket quickly. Overnight and after-hours support means more employees, more training, and more resources, sometimes 3x or 4x your current investment. What kind of ROI does your business get from implementing your own after hours support?

A third party provider already has the resources in place to provide coverage during off hours, as well as the infrastructure for training and support.

If you want to test out a provider, or just want to improve your help desk ROI, look into their options for after-hours support

“AS-IS” SERVICE MODEL

To assess an “As-is Service Model,” look at the following items:

WHAT KIND OF SUPPORT DOES YOUR BUSINESS NEED?

Many people consider desktop support to be the main component of help desk services but there are many levels of support available from third party providers.

Service management, for example, leverages a third party provider to track assets and report to on-site vendors as a single point of contact.

Escalation services can decrease resolution time and eliminate failure with ticket creation and smart call routing.

In addition to these options, many third party providers also offer custom support, tailoring solutions that fit your budget and the needs of your company. Talk to your provider and see what they have available.

1. People Who are the people that make up the current service department? What are their respective skill sets, knowledgebase and background? Who is assigned which tasks, and how is this defined? What are the roles and responsibilities for each team member? Who and how many people are assigned to each support level? What certifications or special experience apply to each person? How is everyone measured?

2. Processes How do the current processes work today? How are incident management, escalation procedures, request fulfillment and issue resolution handled today? Create a step-by-step workflow of different levels of support, from common and recurring problems to issues that require a significant amount of time to resolve. Is issue resolution consistent across the board?

3. Systems and Tools Describe the current systems and tools that the help desk personnel use on a day-to-day basis. Does the system and tools allow flexibility in issue resolution, or are they rigid and hard to work with? Do they provide: basic ticket functionality, message queuing, self-help or knowledgebase searching, call routing, telephony and email integration, system or broadcast alerts or workflow management?

4. Performance Are there SLAs (Service Level Agreements) that need to be comprehended, tracked and reported on? Are performance metrics understood and captured? Are expectations for timeliness communicated and tracked? Is overall customer satisfaction measured by feedback and surveys? What are the specific performance metrics the help desk services department is currently measured on?

5. Third Party Sources Are internal or external partners or service providers part of the help desk team? Is there a clear escalation path, along with end-to-end tracking and final issue resolution accomplished when third party sources are engaged? Are exceptions and root-cause analysis comprehended throughout the process? Do third party sources know and understand their roles entirely?

The definition of the “As-is Service Model” is important to thoroughly understand and define so your executives can gain a better understanding of the entire front-to-end processes involved with help desk service delivery.

The more the “As-is Service Model” is defined, the easier it will be to isolate the current problems, issues and business impacts affecting the perception of your help desk services department.

CURRENT PROBLEMS AND ISSUES

Once the “As-Is Service Model” is defined, identifying the current problems and issues should be relatively straightforward. Identify what is not working and create an itemized list.

Common issues include insufficient training, lack of effective tools, inadequate depth of knowledge for highly technical issues, lack of authorization that can hamper first call resolution, access to certain systems or

systems incompatibilities, inability to scale on demand, non-timely support due to resource constraints, lack of 24x7x365 support, overall lack of after-hours support, and many others.

Make sure to develop a thorough explanation on how the current problems and issues are affecting the help desk team’s ability to provide outstanding support. Business impacts affecting the perception of your help desk services department.

CURRENT BUSINESS IMPACT

Based on issues described above, you can now develop the current business impact. Common examples include:

Do help desk services have a bad delivery reputation within or outside your organization?

Do costs continue to rise while successful service delivery continues to decline?

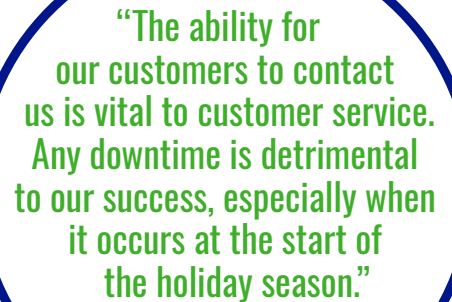
Are projects delivered late and over-budget?

Is there a perceived lack of communication between customers and help desk service providers?

Is the delivery of help desk services aligned with the expectations of the business?

If you review the “As-Is Service Model” and the “Current Problems and Issues” statements, you should quickly be able to identify what is not currently working in your help desk service area.

Understanding this and asking the question, “What is this really doing to our customers and our business” will help you frame the current business impact.



“The ability for our customers to contact us is vital to customer service. Any downtime is detrimental to our success, especially when it occurs at the start of the holiday season.”

- Jeffery Carter
Chief Information Officer
Omaha Steaks

“TO-BE” SERVICE MODEL

Once you have completed the items below, you are prepared to outline a new model.

1. Defined the “as-is” help desk processes and service model
2. Identified and documented the problems and issues that this particular model generates
3. Highlighted the negative business impacts caused by that model

All vendors you ask to participate in your RFP process should be experts in the help desk service space. Use the information they

provide and use the intel to create the new process for your Business Case.

A professional help desk services provider benefits from the economies-of-scale a dedicated service provider can achieve. They take their deep level of expertise and inject that into your new business processes. It would be very beneficial to have them complete a business process map that illustrates how service delivery will work as part of the third party model.

THE IMPORTANCE OF TICKETING

Managing your tickets properly drives the success of your help desk. Through reporting and analytics, you can identify necessary infrastructure improvements, training possibilities, and even areas of support that can be expanded or cut back to improve the return on your IT investment.

You have made the move to analytics driven business; shouldn't your helpdesk follow the same reporting standards?

Be sure to ask your help desk provider about their reporting and ticket tracking capabilities. The right information can make all of the difference.

PROPOSAL

In the Proposal section of the Business Case, explain how the business problem(s) will be resolved. For example, explain how the third party help desk model will help the organization achieve anticipated business outcomes and cost benefits.

Look at the “as-is” business processes, the current service delivery model and all of the associated costs to deliver that model, and compare that with the features,

services and costs of leveraging a help desk services provider.

Typically, a professional help desk services provider can provide significant service level and cost benefits to your organization. You can provide additional support for this Business Case by asking the proposed providers for their assistance and guidance, ensuring that you have comprehensively represented their services.

COST JUSTIFICATION

Although a decision to implement a third party help desk model may be based on improving customer service alone, your chances of success will be significantly increased by doing a cost benefit analysis between the “As-is” and “To-be” environments.

By illustrating to executive management that your organization can both reduce costs and improve help desk service performance; you remove any final barriers to having your Business Case and help desk proposal approved.

When you research, analyze and capture the salient financial data for the operating costs of your current situation, you can compare that to the summarized costs of a help desk services provider. Be sure to identify all associated internal costs to make the most precise comparison possible.

Direct costs may include salaries, recruitment, testing, reviews, systems and tools, API (Application Programming Interface) development, infrastructure, maintenance, projected business growth, mergers and acquisitions (if appropriate),

CONCLUSION

The conclusion to the Business Case summarizes the as-is service model, reiterates the business problem(s) and the negative impacts to the business, and demonstrates a significantly improved service model.

Also include a brief summary of the metrics and measurements that will be used to monitor and track the effectiveness of your recommended help desk partner.

telephony equipment, reporting tools and any other direct or indirect costs.

Receipt of the Vendor RFPs will provide the provider's costs so you can draw comparisons between your current costs and your projected third party costs.

To finalize your cost justification, be sure to include the cost of not implementing your proposal. In other words, what is the cost of not taking action now and how will inaction affect the long-term real and estimated costs of your department.

The final step in preparing this Business Case is to review the proposal at a high level, consolidating and showing the financial benefit to the business.

By showing an increase in customer satisfaction and minimal financial burden to the business, the end result should be a very compelling Business Case.

LEARN MORE

If you would like some personal guidance on completing your own help desk services Business Case, call **844.267.3687** or e-mail sales@tierpoint.com



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