

# Help Desk **Best Practices**



As an IT professional, you know the key to maintaining customer satisfaction is keeping IT functions running smoothly for your organization.

While it isn't possible to have 100% operational uptime, it is possible to be prepared when issues arise so the business impact is minimal. To accomplish this, many IT departments implement a help desk to deliver first-contact resolution for issues that are currently disrupting a IT infrastructure.





# 1 Critical For Your IT Department

A help desk is a *vital* resource for any IT department. The help desk is designed to provide users with an immediate point of contact when they experience problems with their IT services. The ultimate goal of the help desk is to offer first-contact resolution as often and as quickly as possible.

Utilizing a multi-tiered support model, help desks employ knowledgeable personnel to assist with IT issues. Implementation of this multi-tiered support varies widely among IT professionals. In one IT department, it may be one technician available via mobile device. In another, it may be several people who perform some of the support in-house and several people from another company that are contracted for additional support when needed. Whichever support model is chosen, a help desk must have knowledgeable employees trained in the appropriate technologies in order to deliver an immediate response to user IT needs.

1

2

3

4

5



# 2 Running a Best Practice Help Desk: The Standards to Live By

When implementing a help desk, the most strategic method to follow is the Information Technology Infrastructure Library (ITIL) best practices. An ITIL best practice help desk must provide:

- Single point of contact for IT interruptions
- Computer or software consultations
- Tracking capabilities of all incoming problems
- Problem escalation procedures
- Problem resolution

Implementation of best practices for help desk services is outlined in the service management best practices section of ITIL version 3. These areas include:

- **Knowledge Management:** A help desk needs a system that improves operational efficiencies by reducing the time spent to rediscover previous incidents or problems.
- **Problem Management:** A help desk should have a system that gathers information during incident management to help spot problems. This system will identify the root cause of frequent recurring incidents by capturing information in a knowledge base.
- **Access Management:** A help desk should act as the keeper of the user accounts along with password resets. Single ownership by the help desk will ensure quicker response time for users with username or password problems.

1

2

3

4

5



# 3 Focusing on the User



A help desk fixes problems that are taking place at that instant and is most concerned with user functionality. One way of implementing a help desk is for the IT professional to reduce the amount of downtime that users experience once an incident is reported. However, a best practice help desk utilizes processes and software to minimize IT service interruptions both reactively and proactively.

A help desk provides incident management to ensure problems are resolved in a timely fashion. A best practice help desk utilizes software to track incidents—making sure that nothing gets lost. The help desk manages a database that keeps track of IT assets, enabling access (on a real-time basis) to information about software and configuration of each user's IT system. The help desk has the ability to create monthly and annual reports on the number of issues, the time to respond to issues and the time to fix issues—all which might feed into a service-level agreement (SLA).

Additional tasks supported by the help desk include:

- Computer or software consultations
- Change and configuration management
- Problem escalation procedures
- Problem resolution
- Service-level agreements
- Tracking capabilities of all incoming problems

Most importantly, a help desk meets the most essential needs of the user; it gets them operational as quickly as possible.

1

2

3

4

5

# 4 Roles and Responsibilities

1st Level

2nd Level

Manager

3rd Level

Within a help desk, there are different levels of responsibilities. From a management standpoint, the help desk manager determines the daily duties of the help desk staff. It is the manager's responsibility to oversee the help desk and ensure the proper identification, prioritization and assignment of all alerts/service requests and proactive maintenance duties to the appropriate queue, tier or resource.

Industry best practices dictates there be a minimum of three levels of support within the help desk:

## 1st Level Support

The responsibility of 1st level support is to register and classify received incidents and to undertake an immediate effort to restore a failed IT service as quickly as possible.

- If no ad-hoc solution can be achieved, 1st level support will transfer the incident to expert technical support groups (2nd level support)
- 1st level support also processes service requests and keeps users informed about their incident status at agreed-upon intervals

## 2nd Level Support

The role of 2nd level support is to take over incidents that cannot be solved quickly by 1st level support.

- If necessary, 2nd level support will request external support (e.g. from software or hardware manufacturers)
- The aim is to restore a failed IT service as quickly as possible
- If no solution can be found, 2nd level support passes the incident to problem management

## 3rd Level Support

3rd level support is typically based at hardware or software manufacturers.

- 3rd level services are requested by 2nd level support personnel if needed to solve an incident
- The aim is to restore a failed IT service as quickly as possible

1

2

3

4

5



# 5

## What Should a Help Desk Support?

Besides acting as the first point of contact for IT-related questions and issues, many help desks rely on their client management tool to proactively monitor user IT systems, alert on any identified issues and generate service requests in their professional services automation (PSA) solution. This ensures proactive and efficient IT service delivery, as well as proper documentation and tracking of IT issues.

A fully functional help desk should also perform the following support tasks:

- Review client management monitoring reports to identify issues or trends that may impact service or business process continuity for users in order to address them in advance of potential interruption or for capacity planning purposes
- Script or manually deliver required hardware, operating system, application software or service updates, patches and hotfixes
- Customize, produce and deliver performance reports to internal NOC management
- Modify and tune alerting and thresholds on monitored devices, operating systems, application software and services to improve effectiveness and efficiency
- Manage, maintain and update internal, and user infrastructure documentation, processes and procedures in the PSA solution

1

2

3

4

5



# Summary

A help desk is critical to the operations of an IT department. As a centralized intake location for technical issues, it allows for a responsive and timely solution to get users back to business as usual. In addition to handling immediate IT issues, a help desk performs several proactive tasks to ensure IT systems remain operational and downtime is minimized. Thus, utilizing a help desk and following best practices can improve the productivity, efficiency and satisfaction.

# Help

## About LabTech Software

LabTech Software is the brainchild of an IT professional who struggled with the usual challenges and inefficiencies of a reactive IT maintenance and support model. LabTech—its flagship solution—was born out of the urgent need to eliminate technician inefficiencies and the desire to provide preventive and proactive service for an organization. Developed with cutting-edge, agent technology, LabTech is the only global client management platform created by system administrators for system administrators to automate your IT services and eliminate inefficiencies. For more information, please visit [labtechsoftware.com/it](http://labtechsoftware.com/it) or call 877.522.8323.



877.522.8323 | [labtechsoftware.com/it](http://labtechsoftware.com/it)

Source: Gibson, Kevin and Southmayd, Vernon. IT Service Excellence Toolkit: How to meet and exceed customer expectations to ensure customer retention. 2012.