

Case Study One

Understanding and Improving Help-Desk Services

The Client

A British software house selling an excellent, innovative and specialist software product to the global market which has achieved rapid growth, market leadership and substantial success.

The Situation

Diverse feedback from customers indicated particular problems with the Help Desk service. Consequently, some clients by-passed the Help Desk and spoke directly to the Development Team. This elicited various problems with control, management and accountability.

Our Action Plan

1. Discussions with key members of our client's team, from the Managing Director to the Help Desk analysts, helped to break down barriers and build commitment to resultant actions.
2. Running a workshop for the Help Desk team - those most affected by the results of this project - built enthusiasm, with staff seeing our work as an aid, not a threat.
3. Contribution to a User-Group meeting, running a discussion to identify the service issues most important to users and winning their commitment to a subsequent survey to investigate these issues more fully.
4. Consulting with the client to devise a detailed customer questionnaire, taking into account results from the earlier part of the project.
5. Completing a survey of telephone interviews across a representative sample of recent Help Desk users and providing subsequent analysis and report to highlight issues and recommend remedial actions.

Outcomes

- From the key personnel interviews, the Managing Director was surprised to find a lack of consensus about the company's commitment to service, and immediately set up actions to establish better focus and direction.
- From the User Group meeting, discussions amongst users showed that a proposed innovation of a 24 x 7 service option would not be any more useful or cost-effective.
- The client was completely satisfied with our objective, comprehensive and up-to-date questionnaire addressing every aspect of their service.
- The project was announced to customers prior to commencing the survey and customers were impressed by our client's public commitment to service improvement.



- From the survey results, management was surprised to learn that Help Desk staff were often reallocated to work on product development and that Help Desk customer service suffered accordingly.

As part of our surveys we routinely produce Urgent Action Reports. During the survey we found two customers who required urgent action to remedy their dissatisfaction.

Immediate e-mails to our client enabled them to react promptly. As a result, one customer intending to cancel their service agreement was persuaded to renew it.

The revenue saved was greater than our fee for the entire project.

We found that larger customers provided their initial support themselves, in-house. By the time they contacted our client's Help Desk their problems were usually important and urgent. Delays resulting from the normal call logging process were frustrating and unnecessary. Procedures were implemented to "fast-track" these calls to the correct level of expertise.

Our client tried to provide Help Desk customers with a uniformly prompt response, but our measurement of expectations showed that they were generally happy with a 24-hour response but wanted to be confident that they could have a quicker response when needed. Allowing customers set their own priority level by specifying whether problems were crucial, urgent or routine enabled our client was able to schedule work better, and allocate resources more logically. With less fire fighting, urgent issues could be responded to much faster.

Customers were dissatisfied because they often had to explain their problem repeatedly to several people before finding one with appropriate knowledge to address their problem. The client realised that current knowledge was spread too thinly. As a result, Help Desk staff were reorganised into three product teams, each directly accessible via a unique phone number.

Whilst customers were satisfied with the *quality* of the Help Desk service they received, some felt that it was not good value for money since, despite having no choice over contract renewal, they regarded the service as insurance, calling only when something went wrong. Comparisons with our client's competitors suggested opportunities for enhancing the service, such as proactively advising customers of ways in which to use their products more productively. Besides increasing the perceived value of the product and improving customer loyalty, this approach also reduced the number of calls to the Help Desk as customers became more proficient.

Account management provided another source of dissatisfaction. Some Account Managers called too frequently, others not often enough. Some were too difficult to contact, and some were not sufficiently knowledgeable. Therefore, each customer was contacted independently to establish their preferred level of Account Manager contact. Also, office-based Account Executives were introduced to provide a reliable first line of account management. Account Managers could then be used more efficiently, spending less time dealing with minor issues.

Subsequent monitoring project

Based upon our recommendations, these outcomes demonstrate some of the practical actions taken to deliver definite benefits to our client's business. Subsequently, the client asked Customer Satisfaction UK to perform regular monitoring surveys. These smaller-scale surveys enabled the impact of actions to be measured. They also monitored the developing environment, competitors' activities and customers' changing needs and expectations.

This has resulted in the client having a prompt, reliable and objective measure of the cost-effectiveness and relevance of actions taken. Management has greater control, confidence and commitment. Actions can be revised or replaced. Resources are used to the greatest effect. The business is closely in touch with its market.