



MEMBER REPORT

INSPIRING SERVICE  
DESKS TO BE BRILLIANT

# REACTIVE TO PROACTIVE: REDUCING CALL VOLUMES

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# ABOUT THE AUTHOR

The author of this report is SDI's Industry Analyst Ollie O'Donoghue. Ollie is dedicated to providing insightful and practical research to the service desk industry. Ollie's work with a wide range of service teams around the world provides him with ITSM expertise across a variety of business sectors. You can find more of Ollie's work on the SDI Blog and can follow him @SDIOllie.

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# INTRODUCTION

There can be no doubt about it; the modern service desk is changing. Innovative new technologies and processes are shifting the balance of reactive support to proactive support. This can be seen most acutely in service desks driving down call volumes so time and resources can be better spent elsewhere in the support structure. Call avoidance strategies are not new to the industry, however, the technologies that are essential to their success – namely self-service and self-help – are now so ubiquitous in support structures in the consumer space and in enterprise IT that provision is beginning to meet customer expectations. Furthermore, the features, user interface, and capabilities of both self-service and self-help in enterprise IT have started to mirror their counterparts that are undeniably successful in the consumer space.

It is these technologies and processes that this report will focus on, describing how, if implemented effectively, they can significantly reduce the amount of reactive calls the service desk will receive, allowing for the redistribution of resources to more valuable areas of the support structure.

# HOW REACTIVE ARE WE?

Historically, the role of service and support organisations has been intrinsically geared towards reactive support. Research conducted by SDI in 2012 confirms this with service desks on average spending 67% of their time on reactive ‘fire-fighting’ activity as opposed to proactive ‘strategic projects’<sup>1</sup>. However, new research has documented an interesting, albeit restrained shift towards more proactive support, with service desks on average spending 5% more time on proactive support in 2016.<sup>2</sup>

A reasonable inference is that service desks, due in part to better processes and technology, can redesign their support structure to deliver greater value to their customers. Arguably, this can only be achieved if the service desk pivots away from time-consuming and low-value areas of the reactive support model. Increasingly organisations are leveraging the value of self-service and self-help by utilising them to absorb reactive support so resources can be diverted away elsewhere. For many organisations, the first step in realising the potential of these technologies is by driving down direct interactions with the service desk where they can be avoided – for routine password resets, as an example – while continuing to offer traditional communication channels when necessary.

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1. Anatomy of a Service Desk, 2012

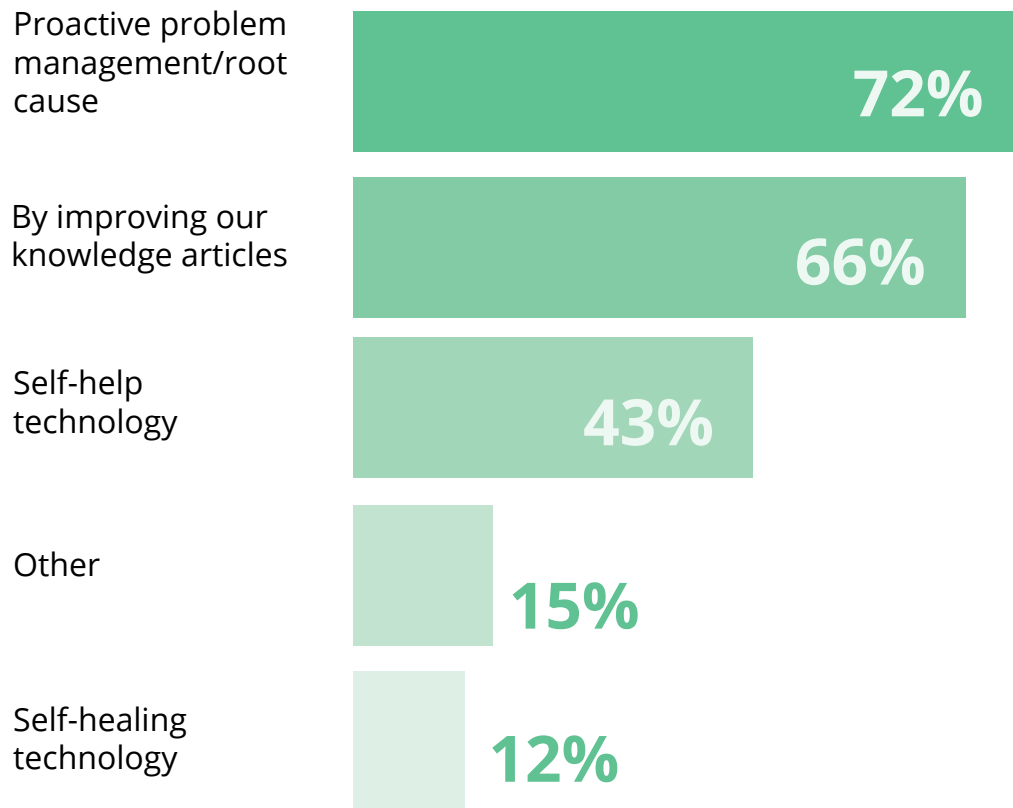
2. Anatomy of a Service Desk, 2016

## HOW CAN WE DRIVE DOWN CALLS?

Service desks that are seeking to provide more business value by shifting towards a proactive support model must first strive to reduce incoming call volumes so resources can be spared without additional cost to the business. Process improvements in areas like problem management as well as the adoption and development of self-service technologies are arguably the most efficient method of doing this. Focusing on three of the most common methods to drive down call volume, this report will go on to demonstrate how proactive problem management, self-help and self-service can significantly drive down incoming calls to the service desk, releasing the resources necessary to begin to adapt the service desk to a model that offers more business value.

There are a variety of measures service desk managers can employ to reduce incoming call volumes. In recent SDI research, the most popular methods were noted as proactive problem management and root cause analysis, alongside improving knowledge articles and self-help technologies.

While service desks may find one method particularly useful above others – problem management may be easier to implement if technologies to support self-help are not available for example – it is worthwhile considering the evaluation and implementation of each of them as part of a service improvement programme. To demonstrate this, the two most popular methods of call avoidance combined can tackle distinct areas of the support structure. Self-help can absorb some of the easy to resolve reactive calls leaving more resources for problem management to stop them from taking place to begin with.



Although cited by considerably fewer service desk managers in the research, self-service was captured under the 'other' category alongside other proactive measures such as IT roadshows and clinics. Self-service will also receive particular attention in this report as it offers service desks the capability to channel calls through another platform. Self-service technologies have developed enormously over the past few years and can now include significant workflow automation and external system integration, changing their position from simply another communication channel to a technology that can offer real efficiencies.

As a result, the three areas this report will focus on in particular are Self-help, Self-service and problem management.

# SELF-HELP TECHNOLOGY

Providing customers with the capacity to resolve their own issues is one of the most effective measures a service desk can take to reduce incoming call volumes. Furthermore, the way new generations of enterprise employees consume IT services make it likely that demand for self-help will increase. Many service desks are now seeking to replicate the position of self-help in the consumer space in their organisation, leading to the introduction of new forms of content such as video guides, and the overall growth of self-help options in the industry. This is supported by SDI research which has revealed an increase in the adoption of self-help technologies, particularly the use of knowledge bases and frequently asked questions (FAQs).<sup>3</sup>

For service desks seeking to embark on introducing self-help, and indeed, those looking to develop their current offering, the first step must be to engage with customers to establish how they would like to consume the services. It may be that video guides will not work for certain customers, customer facing staff, say, as there are restrictions on noise. Other customers may be immediately disengaged if knowledge articles are particularly long or time-consuming. Engaging with customers will ensure service desks provide the right self-help service for their business.

From here, the focus must be on the development and continual improvement of the content. Ensure customers can rate the content for effectiveness and its ability to help them resolve their problem. Feedback like this will be invaluable when service desk professionals seek to understand what type of content is the most popular and therefore requires more resources to develop, and which types are overlooked and can be retired.

Ultimately a self-help offering that customers find intuitive and easy to follow will considerably reduce the amount of incoming calls to the service desk as customers are able to resolve issues without any further assistance. Self-help is particularly useful for low-value repeat interactions such as a password resets, or as a value-add offering such as training guides. As we will discuss later in this report, self-help should not be seen as the only way to reduce incoming call volumes as for many issues it may only be treating the symptoms of a bigger problem that can be resolved altogether through problem management.

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3. Service Desk Benchmarking Report 2015

# SELF-SERVICE

For many service desks, self-service provides the ideal opportunity to begin driving down direct calls. Recent SDI research reveals that over 80% of service desks currently have self-service capabilities, however, on average only 20% of service desk interactions come through self-service, compared to 44% via the telephone.

The comparatively low uptake can be attributed to a variety of reasons, many of which are largely dependent on the nature of the organisation and the technology at its disposal. Regardless, service desks seeking to reduce call volumes will find very few alternatives to self-service that can help them meet their objective.

The design of many of the most successful self-service portals begins from a customer's perspective with a clear understanding of how their journey through the system will work. For example, if there are too many options to select, it may act as a disincentive to customers, who may then simply call the service desk. Similarly, the system needs to be labelled in a way that is intuitive and easy to understand for customers, often too much technical language can deter customers who are confused by the terminology. Understanding the customer journey is critical to ensuring a self-service portal is not only used in the first place but when it is used, customers can follow through with their request.

Crucially, self-service portals need considerable marketing before they can become successful. Service and support organisations have grappled with the best methods of doing this for several years. Unlike counterparts in the consumer space, enterprise service desks have a raft of commitments and agreements they

need to comply with, making drastic actions harder to initiate. Nevertheless, some organisations have successfully boosted their self-service uptake by taking considerably radical moves, such as switching off phone lines on a Friday or removing email as a communication channel. However, not all service desks will be able to follow this method. Indeed, it may simply not be right for their business. More subtle ways of articulating the benefits of self-service may be more appropriate, such as automated messages on phone lines advising waiting customers of the option to use self-service or email campaigns that describe the efficiencies of using the service for certain calls.

Articulating the benefits of self-service to customers is vital for the initial success of self-service. For its long-term success, professionals must ensure the system is not only intuitive and easy to use but also delivers real results to customers. If they use the system, and the experience is poor, they are unlikely to use it again, and may also deter colleagues from doing so.

Although a considerable piece of work in itself, the creation and development of a self-service portal is one of the most efficient ways service desks can reduce incoming call volumes. Incidents and requests logged through the system can be managed by the service desk in a more predictable manner. Furthermore, if service desks invest in workflow automation – such as automated routing of tickets to the relevant team – significant time and resource savings can be made.

# PROACTIVE PROBLEM MANAGEMENT

The aforementioned self-service and self-help are particularly efficient methods of reducing incoming call volumes, however, they are based on the premise that an issue remains to be solved. Problem management differs considerably as it seeks to remove the root cause of incidents so customers never experience them, and therefore need to contact the service desk for a solution.

In SDI research, proactive problem management and root cause analysis are the most common ways service desks seek to drive down call volumes. Undoubtedly this is due to the maturity of the process, and its formalisation in frameworks such as ITIL. Nevertheless, many service desks still do not reap the benefits of problem management – a significant proportion of respondents to a recent survey advised they not only had no problem management capability but were also making no attempt to reduce call volume. Despite this, there are several easy ways to get a process started. Common incidents are an excellent place to start as they present a highly disruptive issue that has the potential to be resolved completely, reducing the call volumes into the service desk while at the same time providing real business value by reducing disruption.

Analysing service desk data to identify the most disruptive incidents or the most commonly reported issues will ensure the service desk is systematically investigating the highest impact issues at the time. As these high impact issues are resolved, the next highest should be investigated. As a form of proactive support and continual service improvement, problem management should be an area of considerable investment for service desk professionals. To put it simply, the return on the initial investment can be enormous. The

time taken to investigate and resolve a problem that led to a large number of customers frequently reporting an issue is time well spent if the service desk can prevent future incidents.

For service desks seeking to reduce incoming call volume, arguably the most beneficial measure for both the business and the service desk is problem management. The benefit to the business is employees are not disrupted and may even be unaware an issue existed with the corresponding benefit to the service desk of freed up resources and time to focus on other proactive support opportunities.



# CONCLUSION

Pivoting a service desk from a reactive support model to proactive is no easy task, and this report has focused on only three of the most commonly used methods to assist in doing this. Nevertheless, service desks seeking to deliver more business value through proactive support can benefit from technologies such as self-help and self-service to absorb some of the reactive calls to free up resources to engage in more valuable work.

Initially, these resources should be dedicated, at least in some part, to the development of the technologies and the increased role of problem management to realise greater returns. Although for some organisations only one measure will fit, those that can use all of them at the same time should find they complement each other. For example, self-service prompts for self-help in certain circumstances, all the while professionals are investigating the root cause to stop it from happening again. In this environment, service desks can find the resources needed to deliver greater value to the business through proactive support.

# ABOUT SDI

The SDI company mission is to inspire service desks to be brilliant. To achieve this mission SDI has developed a set of goals by which it aims to inspire service desks to:

**Embrace:** To raise the quality of service delivery by valuing best practice

**Engage:** To create an inspiring and engaging customer experience

**Invest:** To empower their teams to be inspired, take action and be better


**Shine:** To demonstrate and deliver exceptional business value

SDI sets the globally recognised best practice service desk standards that provide clear and measurable benchmarks for service desk operations and professionals. The standards are designed to encourage service desks to embrace and value best practice in order to raise the quality of service delivery.

For more information about SDI please visit [www.servicedesk institute.com](http://www.servicedesk institute.com)

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