



Insights from CGS

## The Right Strategy for Your Help Desk

Building a Winning Combination Using Insourced and Outsourced Solutions



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# The Right Strategy for Your Help Desk

## Building a Winning Combination Using Insourced and Outsourced Solutions



Source: Computer Economics

As companies extend technology into nearly every aspect of operations, they are discovering the need for comprehensive support programs that both ensure the proper use of that technology and leverage its power. This support—the most fundamental of which is the help desk—frees up employees to focus on core competencies and allows businesses to innovate and grow.

### Yet help desk services are easy to take for granted.

Expectations for professionalism, competence and efficiency from help desk staff are high, but to be effective, help desks require serious investments of capital and personnel. Some elements of help desk solutions that are daunting both to set up and manage include: staffing, ticketing systems, hardware lifecycle planning and asset management, remote help, desk side support, network monitoring, self-help and learning resources.

Companies looking to set up or overhaul help desk functions face options that range from keeping the whole operation in house and managing it internally, outsourcing it all to a skilled partner or finding a balance between the two.

A study from Computer Economics found that among organizations that outsource IT work, the percentage of the total budgeted for outsourcing services rose 23% from 2012 to 2013. Clearly, many companies see outsourcing as an advantage and are continuing to invest in it, but there are advantages to insourcing as well.

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CIOs, CFOs, and CPOs need to focus on the overall help desk strategy and goals that best meet their companies' needs while keeping two things in mind: One, that handling this function internally must not divert resources from the company's core strengths and, two, that relying on aggregators (systems integrators or hardware vendors) must not limit the company's ability to take advantage of future technological advances.

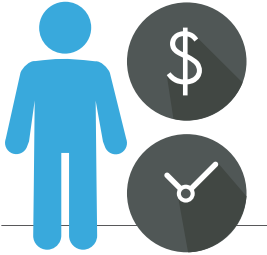
This big picture approach starts with a complete understanding of the core components of a successful help desk, including which of these elements lie within a company's core competencies and which do not.

### COMPONENTS OF A HELP DESK

- **The People:** The human face of your help desk is key to building a positive impression of your organization. According to “Understanding Customers” by Ruby Newell-Legner, it takes 12 positive experiences to make up for one unresolved negative experience.
- **The Functionality:** The tools that help manage and measure support cases can make it easier for you to make improvements in the quality of your service overtime if implemented well.

investment per  
help desk employee

\$75-100k



## The People

Because the people staffing the help desk represent the human face of a company's support system, they need to be engaging, diplomatic and highly skilled. This is why companies setting up and running a help desk internally can expect to invest \$75-100k per help desk employee. Additional costs may include the cost of recruiting as well as the training necessary to improve soft skills and to ensure help desk personnel can provide support for essential new technologies.

Training and certification for technology resources—both basic and advanced—can represent a substantial investment of time and money. Common certifications like Microsoft Certified Systems Engineer (MCSE) may cost \$150, while more specialized certifications can cost upwards of \$800, due to the more complex and lengthy training regimens. And if certification is a requirement for each member of the help desk team, the cost may be even greater.

The possibility of a company's growth raises additional questions, including scalability. As the company expands across a larger service area, will help desk resources be able to support the multiple time zone and language needs of users? Will overflow resources be available during rollouts of new solutions to handle potential increases in call volume? Help desk service are also vital in separating parts of the company or during a post-merger or acquisition integration. Instability at this critical step can slow down sales and marketing efforts as well as back-office operations. Lack of proper resource planning can result in help desk staff being overwhelmed and employees feeling demoralized by feelings that their time is being wasted. If not addressed promptly, these frustrations can lead to work-arounds of broken systems and decreases in productivity.

Establishing metrics for time-to-answer and first-call-resolution rates allows management to better assess help desk performance. A typical outsource partner will work with client companies to set metrics for a service level agreement, often in the range of 30-60 seconds for time to answer and 70-80% for first call resolution. By comparison, typical times to answer for in-house help desk teams may be closer to 2 minutes, with first call resolution rates closer to 60%. Overlooking these in-sourcing inefficiencies and the impact they can have on employee productivity puts strain not only on help desk resources but also on the employees waiting for help. Multiplying this time wasted per call across the thousands of calls handled per month can quickly add up to hundreds of thousands or millions of dollars of lost productivity per year.

By outsourcing help desk functionality, the research, hiring and training cycle is removed, allowing a company to focus solely on its core strengths. External help desk operations are better able to support multiple time zones and languages as well. And an effective outsourcing partner will have "overflow" personnel that allow them to quickly scale up or down as necessary to assist with higher call loads during usage spikes. Experienced vendors will also be able to accurately forecast when these spikes will occur and work with clients to help prepare for them.

A quality outsourcer will also have an understanding of and experience with the best practices in place for specific industries and be able to apply those methods to help improve clients' business performance. In addition, outsourced service providers may establish key performance indicators that businesses can monitor and act upon quickly to better meet goals and address other unexpected performance issues.

## SPEED & EFFICIENCY



### Outsource Partner SLA

Answer time: **30-60 sec.**  
First call resolution rate: **70-80%**

### In-house help desk

Answer time: **120 sec.**  
First call resolution rate: **60%**



CGS

**CGS Recommendation: Outsource.** A quality outsourcing partner will have expertise in hiring, training and managing call center staff to improve program outcomes

**Why CGS:** CGS has an extensive team of certified IT educators and training professionals as well as an in-depth understanding of the function and implementation of the comprehensive help desk resources IT companies have come to rely on, CGS is uniquely situated to satisfy the help desk staffing needs of today's companies.

### The Functionality

In addition to having the trained technology support staff available whenever and wherever a company needs it, there are specific IT help desk support functions that may be supplied internally or outsourced by an IT vendor depending on what structure best suits a company's needs. Some of these functions include:

- Desk side support & handling IMACs
- Ticketing systems
- Asset acquisition, management & hardware lifecycle planning
- Remote help tools
- Network operations center
- Self-help & learning

#### Desk side support & handling IMACs (Installs, Moves, Adds, Changes)

No matter how many help desk tickets an IT support team can handle via phone and web with remote help tools, some technical support services—such as moving equipment, swapping in new hardware or setting up new employees—require hands-on support. By outsourcing services that can be handled remotely, companies free up time for their on-site teams to focus on installing innovative technologies that better support business operations and growth. Keeping on-site staff in house gets new employees more quickly set up with proper equipment and makes inter- or intra-office moves more seamless. This capacity to respond more rapidly also helps build rapport with employees and increases satisfaction. Where outsourcing partners may be able to help with this aspect of a company's help desk, if necessary, is with hiring and staffing.



**CGS Recommendation: Blended.** Keep desk-side support personnel in house and outsource the expertise on how to run it properly, e.g. ticket management, escalation management, etc. A partner can provide advice on the best blended solution to fit your needs.

**Why CGS:** CGS can provide this resource as a service, for customers with offices across multiple regions or numerous, low volume locations. CGS can hire and retain onsite support agents independently or through a premier global partner to put the right resource in place at the right time and cost. However an outsourced, full time, on-site help desk person may not be the most cost-effective solution. CGS is flexible and will work with you to determine the goals of your program and suggest the best fit, even if that means keeping pieces in house.

### Remote help desk

Skilled help desk agents often provide POS support, hardware troubleshooting, software, operations, mobile & BYOD, and logistics support through remote takeover (RTO) services or live phone support. These are some of the most practical and successful functions to outsource if suppliers can own the process from start to finish: tier 1, tier 2, tier 3 and issue resolution. The most effective providers of remote help tools will administer their own ticketing tool or work within existing tracking systems as an extended part of a company's team.



**CGS Recommendation: Outsource.** A quality partner will have skilled agents, not script readers and can work as an extension of your own team. They should be able to help improve productivity and deliver a faster and higher quality experience.

**Why CGS:** Remote help is a CGS strength, as demonstrated by our relationship as a key partner with major systems integrators. By providing the technical expertise and relevant support systems, CGS saves companies money, improves productivity and delivers a better customer experience.

## Ticketing system

Ticketing systems—including such tools as Zen Desk, BMC, Remedy, Footprints and Salesforce—that track help desk requests from open to close are the heart of any help desk and should be owned and managed internally. But for companies without the necessary resources, there are several outsourcing options available at costs ranging from \$250-\$2500 per agent per month. An experienced outsourcing partner can help recommend the best solutions for a company based on the cost, ticket volume and specific industry.



**CGS Recommendation: Keep in house.** Buy or lease your own tool so you “own” the structure and the data. By insourcing this solution you can more easily switch vendors, cherry-pick the best available processes and push vendors to perform better.

**Why CGS:** CGS is flexible enough to work with whichever tool you prefer. Alternatively, CGS offers its own reasonably priced tracking tool with all the essential functions and has extensive expertise implementing these important tools for our customers.

## Asset acquisition, management & hardware lifecycle planning

Hardware lifecycle planning and asset management can be handled in a variety of ways depending on the scale of a company's operations. While smaller companies might use simple spreadsheets to track hardware purchases, usage, service history, trade-ins, leasing and financing options, larger companies may require more sophisticated software solutions. Each comes with its own set of challenges, for example, large software vendors who bundle tracking tools with additional services may put their customers in a difficult situation if one or more of these extra components are found wanting or unnecessary.

Finding the right solution requires familiarity with the latest features and pricing of available solutions, something outsourced help desk partners typically have experience with. This allows a company to focus only on the strategic systems necessary to monitor in-house assets and leaves more time to explore pathways for generating revenue.



**CGS Recommendation: Keep in house.** To take advantage of the best tools for managing assets, the best financing to pay for these assets and the best prices on the assets themselves, clients should own and not bundle through an aggregator.

**Why CGS:** CGS is well versed with all the latest software and familiar with the hardware providers in this service area. CGS also works with best in breed providers and can recommend what strategies and resources are worth implementing. CGS can connect you and your procurement team with our partners to get the best price at the best terms for hardware purchases.





## Network Operations Center


The highly specialized nature of network operations centers make this an area where a company will likely not have the appropriate technological or human resources to monitor servers and critical systems around the clock. Nor will companies be able to perform the troubleshooting or escalation of issues necessary to facilitate their solution. In this case, outsourcing may be in a company's best interest to reduce the risk of information degradation and systems outages and alert employees of the status of network problems in real time.

Leading service providers are also taking advantage of social media to assess and improve the effectiveness of their network operations center services. As customers increasingly share both good and bad help desk experiences on Facebook, LinkedIn, Twitter, Google+ and other sites, top vendors have begun to leverage tools and corresponding best practices to monitor, manage and learn from social Media Channels to Improve Customer Engagement.



**CGS Recommendation: Outsource.** This is an area where outsourcing can provide better capability and reduced cost.

**Why CGS:** CGS has the people and technology to provide around the clock monitoring and troubleshooting tools to manage the escalation process when an alert is triggered and promptly address problems. CGS also makes use of social media monitoring to generate analytics that help companies take advantage of both trending data and conversations to better understand and address customer needs.

By year 2020  **Millennials** will form **50%** of the **global workforce**

## Self-help & learning

A study conducted by CGS in 2013 showed that 12% of customers preferred to use a website self-service portal to resolve their issues. By 2015, that number is expected to jump to 18%. This growth represents the rise of the tech-savvy and independent Millennials, who will form 50% of the global workforce by 2020. To meet the needs of this generation of professionals, companies will need to expand the self-help segment of their help desk resources. Companies that wish to in-source these services will need to select the right portal to support not just their website but mobile apps, social channels and the larger user community as well. As a task, it's daunting, but essential.

Whether on the web or in apps, self-help materials provide a way for users to get answers to simple questions and minimize the amount of remote help desk and/or desk side support needed. But as essential as these services are, they are often too difficult for companies to build, and are better left to outsource partners.



**CGS Recommendation: Outsource.** A quality partner will be able to feedback common questions and problems they are encountering day-to-day in order to continually improve self-help materials and reduce the need for desk side and remote support.

**Why CGS:** With an entire learning division and self-help expertise in the form of e-learning modules, training and gamification training, CGS is an industry leader in supplying self-help and learning resources. Combining our powerful expertise in this area with our remote help desk support services best enables you to reduce call volume and costs.

## WHAT TO CONSIDER WHEN SELECTING AN OUTSOURCING VENDOR

To determine whether a potential outsourcing partner can meet your company's needs, start by identifying what those needs are and what people, processes and technology are needed to produce the results you're looking for.

Outsourcing vendors carry with them the implicit challenge of providing a guarantee of superior service and support while simultaneously serving as your brand's best advocate. Because outsourcing companies are located remotely, there is a level of trust required between the outsource partner and the client that is vital to an effective relationship. If the client feels their brand is not being represented properly, outsourcing may be a liability instead of a benefit. It is essential for companies to find a partner that is both trustworthy and an effective client representative.

No matter what functions your company is looking to outsource, this list of questions form an excellent checklist to assess the qualifications of an outsourcing vendor:

### Outsource Vendor Qualification Checklist



- Does the vendor have experience in the specific processes or programs you would like to outsource
- Are they willing to work with you to set and measure specific KPIs
- Do they have the right technology capabilities
- Do they have onshore or offshore options
- Can they integrate with your existing CRM systems
- Are they in compliance with privacy and data protection policies
- Do they support all the languages you need
- Do they have the flexibility to integrate with your CRM/ticket tools or can they provide the needed tools

## THE RIGHT COMBINATION FOR YOU

The difficulty of choosing to keep one or more essential company functions in house or outsourcing those operations to a trusted partner illustrates the challenges and rewards of each alternative. If your approach is to closely account for every cent and you have the time, personnel and resources to spend on overseeing a help desk, it may be in your interests to keep this function in house. Many companies hire an outside consultant to help identify issues and potential solutions to do just that. At the same time, hiring such consultants and soliciting build plans can be extremely costly.

Most help desk consultants charge \$75,000 before a single cable is installed. However, if you're planning to grow more rapidly and opt to focus on revenue generation instead, outsourcing can free up the executive level resources necessary to achieve those goals.

### But it doesn't have to be a question of either/or.

Many companies choose to outsource some of their help desk functions, while keeping others in house. According to a study from Gray's Harbor College, 52% of companies outsource one third or less of their workload. Any worthwhile outsource partner should be willing to work with you to find a solution that you're not only comfortable with, but that aligns with your company's goals as well.

CGS has extensive experienced guiding partners through the process of outsourcing their help desk capabilities, with the twin results of increasing client revenue and delivering exceptional customer satisfaction scores. If you want the flexibility to reach customers around the globe and the versatility to deliver service in 18 different languages, CGS can help.

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Source: Gray's Harbor College



Serving clients in **America, Europe, Asia, Latin America**

5,000 employees globally

Fluency in **18 languages**

