

UCISA TOOLKIT

# The UK Higher Education Service Desk Toolkit



Universities and Colleges  
Information Systems Association

# Foreword

As someone who is deeply passionate about the role that service desks can play in supporting and delivering on student experience this Toolkit has been a real labour of love. In the past few years I have seen university service desks push and drive the sector forward, rising from the bottom to leading the pack and as Chair of the UCISA Support Services Group I am immensely proud of what has been achieved. However, we must not rest on our laurels and we will need to continue to use a collaborative and creative approach to continual service improvement if we are to continue to develop and deliver high quality support services. The aim of this Toolkit is to provide the UCISA community with a practical and useful reference guide that will inspire our universities to invest in the service desk.

I would like to thank the numerous UCISA colleagues and others within higher education who have not only contributed to the production of this publication but have also been an amazing source of motivation and inspiration. We hope that this Toolkit will encourage many more of you to adopt good practice and implement new approaches for providing effective front line support.

**Sally Bogg, Head of End User Services, Leeds Beckett University**  
Chair, UCISA Support Services Group

The UK higher education sector is undoubtedly a leading light across key service desk areas such as support for bring your own device (BYOD) and utilising social media for customer engagement, and much has been done across the sector to align with service management best practice and work to improve key process maturity. In keeping with other sectors, many higher education organisations are now placing more emphasis on investing in their service desk people through a structured approach to performance management, skills profiling and service desk training. The publication of this Toolkit represents another example of a sector which favours collaboration and partnership in order to facilitate service improvement.

The Service Desk Institute (SDI) is delighted to have built a strong working partnership with UCISA, enabling both organisations to engage with and serve the higher education community. The contents of this Toolkit represent the tangible, practical application of industry best practice, facilitating further service maturity and continual service improvement. This comprehensive guide is sure to become a must have resource, applicable to any service desk function across HE, regardless of size or complexity.

**Carla Thornley, Head of Service Desk Certification and Training**  
The Service Desk Institute (SDI)



# Contents

|  |    |
|--|----|
| Foreword.....  | 1  |
| Executive summary.....   | 11 |
| Why should we be interested?.....                              | 11 |
| Where does this guidance come from? .....                      | 12 |
| Who needs to read this?.....                                   | 12 |
| Toolkit contributors.....                                      | 13 |
| Acknowledgements.....  | 13 |
| 1. Core information .....                                      | 15 |
| 1.1 Service desk standards and targets.....                    | 16 |
| 1.2 Contact methods .....                                      | 18 |
| 1.3 Out of hours support.....                                  | 18 |
| 1.4 Customers and stakeholders .....                           | 19 |
| 2. Mission and vision .....                                    | 21 |
| 2.1 Vision statement.....                                      | 21 |
| 2.2 Mission statement .....                                    | 21 |
| 2.3 Core values .....  | 23 |
| 2.4 Service aspirations.....                                   | 24 |
| 3. Service desk structure and resourcing .....                 | 25 |
| 3.1 Organisational structures, roles and responsibilities..... | 25 |
| 3.2 Job descriptions.....                                      | 27 |
| 3.3 Resourcing and staffing levels.....                        | 27 |
| 3.3.1 Shift patterns and rotas .....                           | 28 |
| 3.3.2 Breaks and lunches .....                                 | 31 |

|        |   |    |
|--------|---|----|
| 3.4    | Student placements: apprenticeships and work experience .....   | 31 |
| 4.     | People .....  | 33 |
| 4.1    | Recruitment and selection.....                                  | 33 |
| 4.2    | Induction and probation .....                                   | 35 |
| 4.3    | One to ones.....  | 35 |
| 4.4    | Training.....   | 36 |
| 4.4.1  | SDI Service Desk Analyst and STI Service Desk Professional..... | 36 |
| 4.4.2  | ITIL Foundation.....  | 36 |
| 4.4.3  | Internal courses .....  | 36 |
| 4.5    | Appraisal and performance reviews.....                          | 37 |
| 4.6    | Professional development .....                                  | 37 |
| 4.6.1  | Secondments .....   | 37 |
| 4.6.2  | Job shadowing.....  | 37 |
| 4.6.3  | Career development portfolios.....                              | 38 |
| 4.6.4  | Personal development plans .....                                | 38 |
| 4.6.5  | Conferences and industry events.....                            | 38 |
| 4.6.6  | Coaching and mentoring.....                                     | 38 |
| 4.6.7  | Additional responsibilities.....                                | 38 |
| 4.7    | Open door management.....                                       | 39 |
| 4.8    | Code of conduct and behaviour guidelines .....                  | 39 |
| 4.8.1  | Absence reporting .....   | 39 |
| 4.8.2  | Dress code and personal hygiene.....                            | 40 |
| 4.8.3  | Working environment.....  | 41 |
| 4.8.4  | Stress management .....   | 42 |
| 4.8.5  | Dealing with abusive customers.....                             | 42 |
| 4.8.6  | Mobile phone and internet usage .....                           | 43 |
| 4.8.7  | Expected behaviours .....                                       | 44 |
| 4.8.8  | Mutual dignity and respect.....                                 | 45 |
| 4.9    | Managing leave requests .....                                   | 45 |
| 4.10   | Skills matrices .....   | 46 |
| 4.11   | Reward and recognition.....                                     | 47 |
| 4.11.1 | Awards.....   | 47 |
| 4.11.2 | Presentations at events and conferences.....                    | 47 |
| 4.11.3 | Customer feedback.....  | 47 |
| 4.12   | Staff satisfaction .....  | 47 |
| 4.13   | Health and safety.....  | 48 |

|       |  |    |
|-------|--|----|
| 4.14  | Capability and performance management .....                                | 48 |
| 4.15  | Social responsibility .....  | 48 |
| 5.    | Processes and procedures.....  | 51 |
| 5.1   | ITSM processes.....  | 51 |
| 5.1.1 | Incident management.....   | 52 |
| 5.1.2 | Request fulfilment .....   | 54 |
| 5.1.3 | Change management.....   | 54 |
| 5.1.4 | Problem management.....  | 54 |
| 5.1.5 | Service level management .....   | 54 |
| 5.1.6 | Knowledge management.....  | 55 |
| 5.1.7 | Continual service improvement .....  | 56 |
| 5.2   | Business support processes .....   | 56 |
| 5.3   | Service desk procedures.....   | 57 |
| 5.4   | IT Service continuity management and business continuity management .....  | 58 |
| 5.5   | Service transition .....   | 59 |
| 5.6   | Information security and IT governance.....                                | 60 |
| 5.7   | Strategic and business planning .....                                      | 60 |
| 6.    | Tools and technologies.....  | 61 |
| 6.1   | IT Service management tools .....  | 61 |
| 6.2   | Telephony and unified communications .....                                 | 62 |
| 6.2.1 | Automated call distribution .....  | 62 |
| 6.2.2 | Computer telephony integration .....                                       | 62 |
| 6.3   | Remote support tools.....  | 62 |
| 6.4   | Knowledge management tools.....  | 62 |
| 6.5   | Event management and alert services.....                                   | 63 |
| 7.    | Performance metrics.....   | 65 |
| 7.1   | Critical success factors (CSFs) and key performance indicators (KPIs)..... | 65 |
| 7.2   | Standard metrics.....  | 66 |
| 7.2.1 | Number of incidents, number of requests.....                               | 66 |
| 7.2.2 | First level fix (FLF).....   | 66 |
| 7.2.3 | First contact resolution (FCR) .....                                       | 66 |
| 7.2.4 | Average and longest time to respond by contact method.....                 | 66 |
| 7.2.5 | Average time to answer and longest time to answer.....                     | 66 |
| 7.2.6 | Abandonment rate.....  | 66 |
| 7.2.7 | Reopened incident rate.....  | 67 |
| 7.2.8 | Backlog management (aged calls).....                                       | 67 |

|        |  |    |
|--------|--|----|
| 7.2.9  | Customer satisfaction.....                     | 67 |
| 7.2.10 | Staff satisfaction.....                        | 67 |
| 7.2.11 | Remote control and self-help monitoring.....   | 67 |
| 7.2.12 | Staff retention and attrition .....            | 67 |
| 8.     | Customer engagement .....                      | 69 |
| 8.1    | Customer service standards.....                | 69 |
| 8.2    | Customer satisfaction .....                    | 70 |
| 8.3    | “You said, we did...”.....                     | 71 |
| 8.4    | Business relationship management .....         | 71 |
| 9.     | Quality assurance.....                         | 73 |
| 9.1    | Benchmarking and best practices .....          | 73 |
| 9.1.1  | Service Desk Certification.....                | 73 |
| 9.1.2  | Customer Service Excellence .....              | 73 |
| 9.1.3  | ITIL .....                                     | 74 |
| 9.1.4  | ISO20000.....                                  | 74 |
| 9.2    | Call coaching and interaction monitoring ..... | 74 |
| 9.3    | Service review.....                            | 76 |
| 9.4    | Continual service improvement .....            | 77 |
| 9.5    | Horizon scanning.....                          | 77 |
| 10.    | Communication and marketing.....               | 79 |
| 10.1   | Promotion and marketing.....                   | 79 |
| 10.2   | Social media.....                              | 80 |
| 10.3   | Meetings.....                                  | 81 |
| 10.4   | Service status page.....                       | 81 |
| 10.5   | User-facing communications.....                | 81 |
| 11.    | Summary.....                                   | 83 |
| 11.1   | Mission and vision.....                        | 83 |
| 11.2   | Service desk structure and resources.....      | 83 |
| 11.3   | People.....                                    | 83 |
| 11.4   | Processes and procedures .....                 | 84 |
| 11.5   | Tools and technologies.....                    | 84 |
| 11.6   | Performance metrics .....                      | 84 |
| 11.7   | Customer engagement.....                       | 84 |
| 11.8   | Quality assurance .....                        | 84 |
| 11.9   | Communication and marketing .....              | 85 |
| 12.    | Conclusion .....                               | 87 |

|   |     |
|---|-----|
| 13. Annex - Example resources to accompany the Toolkit .....  | 89  |
| Resources for Chapter 1 - Core information .....  | 91  |
| Key stakeholders of the service desk – Manchester Metropolitan University .....                         | 92  |
| Making the best use of the IT Support Centre – The University of Manchester .....                       | 93  |
| Out of hours Support statement – University of Leeds .....  | 94  |
| Template for an IT Help Desk manual (headings) - Robert Gordon University .....                         | 95  |
| Resources for Chapter 2 – Mission and vision .....  | 97  |
| IT Service Desk vision and mission – University of Leeds .....  | 98  |
| Resources for Chapter 3 – Service desk structure and resourcing .....                                   | 99  |
| Example - service desk organisation structure .....   | 100 |
| Service desk organisation structure – University of Bath .....  | 101 |
| Service desk organisation structure – Leeds Beckett University .....                                    | 102 |
| IT Support Technician job description – University of Bath .....  | 103 |
| IT Supporter (Service Desk) job description – University of Bath .....                                  | 104 |
| IT Support Manager (Service Desk) job description – University of Bath .....                            | 105 |
| Service Manager (Service Desk, ITP and Assistive Technology) job description – University of Bath ..... | 106 |
| Incident Coordinator job description – Manchester Metropolitan University .....                         | 107 |
| ITSM Toolset Administrator job description – Manchester Metropolitan University .....                   | 108 |
| Resources for Chapter 4 – People .....  | 109 |
| IT Technician job advert – University of Bath .....   | 110 |
| Service Desk Manager job advert – Leeds Beckett University .....  | 111 |
| Service Desk induction timetable – Manchester Metropolitan University .....                             | 112 |
| Helpline induction timetable example – University of Edinburgh .....                                    | 114 |
| Probation form – University of Edinburgh .....  | 117 |
| Service desk meetings template .....  | 119 |
| One to one template – University of Bath .....  | 120 |
| IT Support Advisor training plan – University of Leeds .....  | 121 |
| Annual development review (Grades 1-6) – University of Edinburgh .....                                  | 122 |
| Annual development review (Grades 6-10) – University of Edinburgh .....                                 | 125 |
| Personal Development Plan Template – University of Bath .....   | 129 |
| Skills matrix – University of Edinburgh .....   | 130 |
| Service Desk Skills matrix example – Manchester Metropolitan University .....                           | 134 |
| IT Service Desk staff satisfaction survey – University of Leeds .....                                   | 135 |
| Social responsibility – Manchester Metropolitan University .....  | 137 |
| Social responsibility – University of Leeds .....   | 138 |
| Resources for Chapter 5 – Processes and procedures .....  | 139 |

|   |     |
|---|-----|
| Sample Incident management flow.....  | 140 |
| Service Desk opening procedure – University of Bath .....   | 141 |
| Hazardous waste collection – University of Bath .....   | 143 |
| Service desk new starter checklist – University of Bath .....   | 144 |
| Service desk leaver checklist – University of Bath .....  | 148 |
| Laptop clinic booking process – University of Bath.....   | 150 |
| Service acceptance criteria – University of Leeds .....   | 151 |
| Operational support model template – Leeds Beckett University.....  | 152 |
| Sample service request flow .....   | 154 |
| Resources for Chapter 6 – Tools and technologies.....   | 155 |
| IT Service Management Systems in use across higher education – UCISA Corporate<br>Information Systems Survey 2016 ..... | 156 |
| Resources for Chapter 7 - Performance metrics.....  | 157 |
| Helpline objectives - University of Edinburgh.....  | 158 |
| IT Service Desk CSFs and KPIs - University of Leeds.....  | 159 |
| Resources for Chapter 8 – Customer engagement.....  | 161 |
| Service desk feedback form – University of Leeds.....   | 162 |
| Resources for Chapter 9 – Quality Assurance.....  | 165 |
| DIRFT - Do It Right First Time - Manchester Metropolitan University .....   | 166 |
| Resources for Chapter 10 – Communication and marketing .....  | 169 |
| Using Twitter - Manchester Metropolitan University .....  | 170 |
| Using Twitter – University of Leeds .....   | 171 |
| IT User Services communications road map – University of Leeds.....   | 172 |
| Using social media – Manchester Metropolitan University.....  | 174 |
| 14. Copyright, disclaimer and availability .....  | 177 |





# Executive summary

This Toolkit provides an overview of service desk good practice in a higher education context, and is supported by practical guidance that has been collated from across the support services community.

For the purpose of consistency, we refer to “service desk” throughout the document however, we are aware that various names and terminology are used throughout the sector and the Toolkit is not limited to use by the traditional IT service desk but may be utilised by any area that is providing a first line support function, such as a library or student services.

## Why should we be interested?

The changes in higher education over recent years have seen many university service desks strive to improve and professionalise their services. Universities are starting to recognise the need to provide high quality support services, and since 2014 there has been an increased investment in the people, products and processes that underpin our service desks.

Whilst much good work has taken place across the sector there is still some way to go. Service desks continue to face many challenges: lack of resources, outdated IT Service Management (ITSM) tools, the ability to recruit and retain high quality staff and an increasing business demand for our services.

This Toolkit can be used to help understand and address these challenges. For some service desks an adopt and adapt approach can be taken, using elements of the guidance to address specific issues and areas of concern. For other organisations, a more visionary and strategic approach will be required, and for these it is recommended the Toolkit is used alongside other frameworks such as ITIL and Service Desk Certification to provide practical guidance on implementing good practice.

This Toolkit will enable you to:

- develop a clear understanding of your services’ aims and objectives;
- document a clear definition of your service offering;
- understand your various stakeholders and customer base and how to obtain customer feedback;
- understand how implementing clearly defined processes and procedures can support and enhance your service;
- identify suitable Critical Success Factors and Key Performance Indicators that will enable you demonstrate the value of your service and how it is improving over time;
- understand the various roles and responsibilities within your service desk team;
- develop an understanding of good practice for service desks within the higher education sector;
- understand what industry standards and accreditation may be suitable for your service.

## Where does this guidance come from?

The creation of this Toolkit was inspired by a number of people from across the UCISA community who have been persistent in driving forward service desk service improvements within the higher education sector. The Toolkit builds on a number of workshop sessions “Producing a service desk good practice guide<sup>1</sup>” run at the Advisory and IT Support Symposium in June 2011, and a one day event “Service Desk Good Practice Guide<sup>2</sup>” that was run by UCISA’s Support Services Group<sup>3</sup> in January 2012. The sector has certainly come a long way in this time.

The Toolkit has used a number of other UCISA resources, in particular the Cherwell, SDI and UCISA UK Higher Education Service Desk Benchmarking Report 2014<sup>4</sup>, and the Topdesk, SDI and UCISA UK Higher Education Service Desk Benchmarking Report 2016<sup>5</sup>, both of which have provided useful insights into the drive for increasing business alignment of the service desk and adoption of good practice within the sector.

The Toolkit has been developed as a collaborative effort by a wide range of support staff from eight institutions, with the Service Desk Institute providing additional advice and external verification. The contributors are working in a number of UK universities in varying front line roles, and a few have experience of support services from outside of the higher education sector. The Toolkit contributors ran a number of workshops in Spring 2017 to collate and document examples of good practice, with the lead author providing additional information and resources.

By providing a wide range of good practice information, as well as hints and tips, this Toolkit is focused on the realities of developing and managing high quality front line support services in the current UK higher education context.

## Who needs to read this?

Moving away from a service delivery model (which is categorised as reactive and characterised by help desks focussing solely on issue resolution) towards a proactive model (where support staff focus on customer experience and preventative activity and service desks offering value added services) will require collaboration and creativity and most importantly buy in from senior university management and other key stakeholders.

This Toolkit contains information for the service desk about the service desk function, its processes and procedures, roles and responsibilities and other good practice information. It will help staff working within support areas understand the role of the service desk and the key part that all individuals play in the success of this essential function.

The Toolkit will act as a practical guide for those looking to build and enhance their front line support services but will also be beneficial to senior managers and other stakeholders, helping them understand the critical role the service desk plays in defining strategic objectives and delivering an excellent student experience.



1 [www.ucisa.ac.uk/groups/ssg/Events/2011/Sym2011](http://www.ucisa.ac.uk/groups/ssg/Events/2011/Sym2011)  
2 [www.ucisa.ac.uk/groups/ssg/Events/2012/goodpractice](http://www.ucisa.ac.uk/groups/ssg/Events/2012/goodpractice)  
3 [www.ucisa.ac.uk/groups/ssg](http://www.ucisa.ac.uk/groups/ssg)

4 Cherwell, SDI and UCISA (2014) UK Higher Education Service Desk Benchmarking Report 2014 [www.ucisa.ac.uk/bestpractice/surveys/service\\_desk/2014](http://www.ucisa.ac.uk/bestpractice/surveys/service_desk/2014)

5 SDI, UCISA and TopDesk (2016) UK Higher Education Service Desk Benchmarking Report 2016 [www.ucisa.ac.uk/publications/beckmark\\_sdi](http://www.ucisa.ac.uk/publications/beckmark_sdi)

## Toolkit contributors

Alex Allen, Service Desk Manager, IT Services, Leeds Beckett University

Sally Bogg, Head of End User Services, IT Services, Leeds Beckett University

Sherilyn Elmes, Service Manager, Service Desk, Assistive Technology and ITP, University of Bath Computing Services

Martina Holubcova, Service Desk Manager, Manchester Metropolitan University

Antonia Jones, Senior IT Support Advisor, University of Leeds

Jenny Jordan, IT Customer Services Manager, Edge Hill University

Amanda Marlor, ICT Service Desk Team Leader, Lincoln University

Lisa McDonald, User Support Manager, User Services Division, Information Services, University of Edinburgh

Kath Murray, Helpdesk and ITAV Team Lead, Robert Gordon University

Tim Walker, IT Service Desk Manager, IT Service Desk, University of Leeds

## Acknowledgements

The work to produce the Toolkit was led by Sally Bogg, Head of End User Services at Leeds Beckett University, who was also the lead author.

Carla Thornley, Head of Service Desk Certification and Training at the Service Desk Institute (the SDI) contributed to this Toolkit and ratified the content. The SDI sets 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.

Anna Mathews, Head of Policy and Projects at UCISA was the project manager for this publication. All illustrations are by Lynton Hemsley. Cover image © University of Leeds.

We would like to thank the UCISA Support Services Group for their assistance and insight.



# 1 Core information

It is essential to define and document the strategic role of the service desk and outline your service offering. This will help to educate and inform customers, new staff and other stakeholders, and furthermore facilitate greater understanding of the strategic role the service desk can play for colleagues in other areas of IT Services. Once documented, this will serve as a point of reference for existing service desk staff and help to answer customer queries about the service as and when required.

You may wish to include some background information and context setting about where the service desk fits within both the IT and library departments and the wider university. Many universities will have a service catalogue in which the service desk function is already defined<sup>6</sup>.

## Manchester Metropolitan University IT helpline

### Our purpose

We are here to be the first point of contact for all staff, students and guests at Manchester Met for all issues, requests and questions related to IT, providing a professional, informed and non-stop service whenever and wherever our customers need help.

We are also here to support our colleagues across IT Services in delivering the best and most efficient service to our customers, by providing them with accurate, timely information and initial analysis of issues and wherever possible a full resolution without any escalation.

## Edge Hill University IT Service Desk

The IT Service Desk provides a first point of contact service for all members of staff, on and off campus. Additionally, support is provided for current students with data recovery, Wi-Fi access issues and those in residence who experience problems with the IT equipment provided in their rooms.

We are an escalation point for the Library who provide other first level support for students.

<sup>6</sup> UCISA (2010) ITIL for the HE community Best Practice Guide [www.ucisa.ac.uk/publications/itil](http://www.ucisa.ac.uk/publications/itil)

## University of Leeds IT Service Desk

Provides a single customer focused point of contact with IT for staff, students and visitors which offer first level IT support, incident resolution and request fulfilment. Service features include;

- online resources, FAQs and user guides
- incident management and request fulfilment
- end user related IT related communications
- proactive stakeholder engagement/regular customer and user satisfaction surveys.

### 1.1 Service desk standards and targets

Defining key service desk targets and expected service standards will enable you to set and manage customer expectations, ensure a consistent level of service, and help the team understand the goals and objectives they are working towards. This ensures that everyone is pulling in the same direction. Being open and transparent about your expected service standards and demonstrating your commitment to the university also helps build trust and a positive relationship with customers and colleagues.

These standards can range from high level aims, such as an expanded value proposition statement, or very specific measurable targets, for example if you have service level agreements (SLAs).



*“Trust, honesty, humility, transparency and accountability are the building blocks of a positive reputation. Trust is the foundation of any relationship.”*

Mike Paul

### Manchester Metropolitan University IT Helpline. Our commitments to the University:

- We provide 24/7 help to our customers;
- We aim to respond to phone calls in less than 1 minute and emails within 2 days;
- Wherever possible we aim to provide immediate resolution or advice;
- We provide initial coordination and communication of major incidents;
- We collect, analyse and act on customer satisfaction feedback;
- We drive the formalisation, documentation and improvement of IT service management processes;
- We safeguard the IT change management process;
- We own, manage and drive development of the service management tool used by IT Services;
- We are committed to improving the way we measure, communicate and act on IT Services performance through metrics;
- We support and encourage innovative aspirations of our customers and colleagues;
- We are committed to ‘do it right first time’ and we are continually learning from our mistakes in order to deliver top quality information to our customers and colleagues in our call logging.

## The University of Edinburgh IS helpline objectives

- We will provide support to users at the point they need it;
- We will deliver an excellent customer service;
- We will deliver our services as efficiently as possible;
- We will help Information Services develop and deliver the services the users need;
- We will act as the users' partner within Information Services;
- We are always improving quality of service;
- We will develop staff through training, support and exposure to all aspects of IS work;
- We will ensure knowledge is recorded and shared within the team and that all support staff are aware how to find it;
- We will ensure self-help knowledge is available to our user community in a format they can find and use;
- We will ensure users get timely and relevant information about the status of IS services.

## The University of Leeds IT Service Desk

We aim to:

- Resolve 70% of calls at first level;
- Answer 90% of calls within 2 minutes 30 seconds;
- Deal with walk in enquiries within 5 minutes;
- Respond to voicemails within one hour;
- Respond to emails within four hours.

We also provide a number of additional services including printer credit sales, a software and hardware service (FixIT) and a loan laptop service (LoanIT)

## 1.2 Contact methods

The 2016 UK Higher Education Space HE Service Desk benchmarking report<sup>8</sup> confirmed that telephone, email and in person remain the most popular contact methods within our service desks however the use of social media, live chat and self-service is on the increase. Our customers and users expect to be able to use contact methods that suit them and the way they work - a one size fits all approach no longer suits the needs of our user demographic.

The rise of omnichannel support in the wider service desk industry sees customers expecting to be able to start an activity via one channel and then seamlessly transfer to another. However, omnichannel support is not mature in service desks in universities and colleges.

Whatever contact channels you offer it is important to define and publish response times per channel to help manage customer expectations. From our experience it is better to provide a smaller number of channels but in a responsive and reliable way, rather than diluting the attention of your service desk staff into a multitude of channels, if your service is not ready to support them consistently.

|              | Higher Education 2016 | Industry Wide 2015 |
|--------------|-----------------------|--------------------|
| Email        | 43%                   | 32%                |
| Telephone    | 35%                   | 44%                |
| Self-service | 16%                   | 20%                |
| In person    | 14%                   | 7%                 |
| Live chat    | 1%                    | 7%                 |
| Social media | 1%                    | 0%                 |
| SMS          | 0%                    | 0%                 |
| Other        | N/A                   | 7%                 |

Table 1: Percentage of calls received per channel, SDI UCISA HE Service Desk Benchmarking Report, 2016<sup>9</sup>



*“Understanding the channels into the service desk gives valuable insight, helping to inform decisions over the marketing of specific channels or their future adoption.”*

Ollie O’Donoghue

(UK HE Service Desk Benchmarking Report, 2016<sup>7</sup>)



## 1.3 Out of hours support

It can be frustrating for users to encounter IT issues that prevent them from working and this frustration is increased when these issues occur outside of standard support hours. Providing a 24/7 support function will ensure customers always have access to the support they need but this can be costly and is not always an effective use of limited resources.

Some service desks offer out of hours support, through internal or external capabilities, for example using NorMAN helpline<sup>10</sup> or outsourcing to other third party suppliers. Out of hours support can be costly so it is important that the value of providing this service is regularly reviewed to ensure it is delivering business benefit.

When using external capabilities, considerations need to be made regarding effective ongoing in hours versus out of hours handover communication, integration of service management tools between organisations, and the extent to which you equip your out of hours provider with access to your processes, systems and knowledge. The more you plan the above, the better value you will get out of your out of hours support.

7 DI, UCISA and TopDesk (2016) UK Higher Education Service Desk Benchmarking Report 2016 [www.ucisa.ac.uk/publications/beckmark\\_sdi](http://www.ucisa.ac.uk/publications/beckmark_sdi)  
 8 SDI, UCISA and TopDesk (2016) UK Higher Education Service Desk Benchmarking Report 2016 [www.ucisa.ac.uk/publications/beckmark\\_sdi](http://www.ucisa.ac.uk/publications/beckmark_sdi)  
 9 SDI, UCISA and TopDesk (2016) UK Higher Education Service Desk Benchmarking Report 2016 [www.ucisa.ac.uk/publications/beckmark\\_sdi](http://www.ucisa.ac.uk/publications/beckmark_sdi)  
 10 [www.outofhourshelp.ac.uk/](http://www.outofhourshelp.ac.uk/)

It is also important to ensure you set expectations for your users. Your service desk may offer out of hours support, however there may be no second or third line teams available out of hours, meaning that your out of hours service may take longer to resolve issues. You should ensure that you are clear on the level of support offered and set expectations on incident resolution and service restoration in the event of disruption.

If offering an out of hours is not an option for your service desk, consideration should be given to designing and implementing a high quality self-service function as this can provide a cost effective means of delivering extended services.

In 2015 the UCISA networking group carried out a survey<sup>11</sup> on the provision and coverage of out of hours support in UK higher education institutions. The survey sought to identify the prevalence of different support models and any issues institutions were experiencing in establishing out of hours arrangements. The results of the survey can be used as a guide for institutions contemplating introducing an out of hours service.

## 1.4 Customers and stakeholders

The service desk needs to understand and appreciate the diversity of people within the user community. Different users will have different needs and expectations. The service desk will need to be adept at collecting and presenting information to different audiences. Some users will be more technically able than others and some may need a faster response due the significance of their role (VIPs). It is therefore worth investing some time identifying, defining and documenting the different customer groups, for example: distance learning students, research and teaching staff and those who are classified as VIPs in your institution.

How you segment and differentiate your customer groups depends on your university, but most universities will be able to identify the following stakeholders for service desk:

### Students:

- undergraduate;
- postgraduate;
- students with on campus presence;
- distance learning students, and;
- international students.

### Staff:

- academic staff;
- professional support staff;
- senior or VIP staff;
- staff in other service delivery functions of the university for example library or other student support services, and;
- second and third line IT staff.

### Guests and visitors of the university:

- one-off visitors;
- long term guests.

### The general public

<sup>11</sup> UCISA Out of Hours Survey Report [www.ucisa.ac.uk/publications/ng\\_ooh\\_survey](http://www.ucisa.ac.uk/publications/ng_ooh_survey)



## 2 Mission and vision

Utilising a top-down approach that allows service desk staff themselves to devise a clear vision and mission can be invaluable in empowering people, in addition to demonstrating to the team how the role of the service desk and the work they undertake is directly supporting both the department and the university. Defining the vision and mission provides clarity and can help staff to understand their fit within the overall organisation. Your service desk mission and vision should embrace and support the overall vision and mission of the institution rather than be separate from it.

It is important to include the team in the creation of service desk vision and mission statements as this will help develop a sense of pride and ownership, and build commitment to meeting the university and service desk objectives.

### 2.1 Vision statement

Vision statements set the long term aspirational goals, and are used to define purpose and communicate values. They provide a sense of direction and guidance for strategic planning and can help direct strategic decision making.

### 2.2 Mission statement

Mission statements bring focus to overall goals and objectives. A good mission statement should always be written from the customer perspective and communicate who we are, what we do and who we do it for.

#### **Leeds Beckett University**

##### **Vision**

Our vision to to become a sector leading 2 star certified Service Desk by 2018, providing consistent and high quality services to our staff, students and visitors.

##### **Mission**

The Leeds Beckett IT Service Desk is dedicated in providing a friendly and professional IT AV support and media loans service for our customers.

## University of Edinburgh

### Vision

Striving for Service Desk excellence at the heart of the University of Edinburgh

### Mission

To deliver IT and library help and support to continually improve the user experience, enabling the goals of Information Services at the University of Edinburgh.

## Manchester Metropolitan University

### Vision

We aim to be a world-class round-the-clock first point of contact for today's and tomorrow's world-class professionals at Manchester Met, whenever and wherever they need IT, helping them achieve their objectives, goals and dreams.

### Mission

We are responsive, approachable and informed. We translate and enable IT for all Manchester Met students, staff and guests.



### VIEWPOINT

“At the University of Edinburgh we found that the best thing for inspiring the team and encouraging them to be better together was the vision statement exercise we carried out. We started by discussing some potential vision statements in our Service Improvement group before presenting these to the team as a starting point for their own discussions. The whole team gathered in a room to brainstorm the ideas and decide what statement would best represent us and our aims.

The team relished this exercise and enjoyed discussing the different strengths that we wanted to be recognised for. There were a lot of ideas but everyone settled on the statement: “Striving for Service Desk Excellence at the Heart of the University of Edinburgh”, with our mission statement “To deliver IT and Library help and support to continually improve the user experience, enabling the goals of Information Services at the University of Edinburgh.”

This really sums up our aims – we strive to be excellent and the team has worked really hard to put the Service Desk at the heart of the University of Edinburgh. While we fully embrace the Information Services Group (ISG) vision of being the best at what we do and mission of being at the heart of excellence, we have also narrowed these messages down to create Service Desk specific vision and mission statements, aligned with ISG but also reflecting our team's specific contribution and the role we play in achieving the overall success of the organisation.”

**Lisa McDonald, User Support Manager, University of Edinburgh**

## 2.3 Core values

Defining a set of values for the service desk can help create a sense of unity, develop a strong team culture, hold your team to a high standard of service delivery and ensure that everyone is working towards the service goals and objectives. Values are going to look different for every team, department and university as they will depend on customers, goals, and organisational mission and visions. It is important to ensure that the core values become embedded and incorporated into the day-to-day approach to service delivery. Many universities have their own organisational values but if you wish to create some that are specific to the service desk or department it can be useful to take the following steps:

- decide who to include in the process;
- run a workshop to decide what is important to your team, your organisation and your customers;
- consolidate and then refine the output from the workshop;
- ensure that the values match the team culture;
- evaluate your values as a complete set (no more than five are recommended).

### Manchester Metropolitan University IT helpline values\*

- **HEART:**
- Honesty
- Excellence
- Accountability
- Recognition
- Teamwork

\*These are shared across the whole department

### University of Edinburgh IS helpline values

- We are all committed to the User Support Vision - Striving for Service Desk excellence at the heart of the University of Edinburgh.
- We aim to provide timely and professional support and advice to our users.
- We will communicate clearly and professionally.
- We will listen to our users and use their ideas and suggestions to help improve our services.
- We work as a team, supporting each other, sharing ideas and solutions.
- We treat each other with dignity and respect - treating others the way we'd want to be treated ourselves.
- We are accountable for our actions - we will take ownership of any mistakes or problems and resolve them to the best of our abilities.

## 2.4 Service aspirations

You might want to expand on your vision statement by listing your service aspiration perhaps in a 12, 24, 36 month format or through a service improvement roadmap. Documenting service aspirations can help your service desk team to understand future direction and plans, and ensure that they are engaged in taking the service forward. It can also be a good way of recognising ideas and input from the team that you may wish to implement in the future but are currently unable to due to time or budget constraints.



### Manchester Metropolitan University IT Helpline Service aspirations

- Implement a customer self-service portal
- Implement a chat request contact method
- Configure a management dashboard
- Produce better data analysis and utilisation of the data already known
- Improve our documentation and approach to knowledge management
- Promote the service and become a recognised and trusted service provider for the University
- Continuous improvement in our Shift Left Strategy

## 3 Service desk structure and resourcing

People are the service desk's most valuable asset and studies have shown that there is a huge difference in the performance between motivated and demotivated staff. Within high performing service desk teams across all sectors, it is common to see high levels of discretionary effort - in other words, staff who happily take it upon themselves to go the extra mile for the benefit of the service. Therefore, it is really important to invest time and effort in the people that are responsible for service delivery.

Effective people management ensures that your service desk runs smoothly and efficiently. Ensuring service desk staff feel valued and appreciated will mean that they are more likely to deliver the excellent customer service we need.

It is important that the service desk has the right people doing the right jobs. To make sure this happens it is essential to have rigorous recruitment, induction and training procedures in place. Staff who are well managed and given continuous training and evaluation are better able to do their jobs and deliver excellent service to our customers and users.



*"Clients do not come first. Employees come first. If you take care of your employees, they will take care of the clients."*

Richard Branson



*"It really is true that happy people give great service."*

Antonia Jones

### 3.1 Organisational structures, roles and responsibilities

The key to an effective service desk is ensuring that there is clear accountability and that roles within the service desk are defined and understood. It can be helpful to provide the service desk with a RACI matrix<sup>12</sup> for roles and responsibilities within the service desk and also the wider department. This will help them understand how the different roles and teams fit together and understand the structures and reporting lines within the service. This is essential for effective ownership and escalation. The size of an organisation, how it is structured, the existence of external partners and other factors will all influence the kind of roles needed on your service desk.

<sup>12</sup> [https://en.wikipedia.org/wiki/Responsibility\\_assignment\\_matrix](https://en.wikipedia.org/wiki/Responsibility_assignment_matrix)

## ITIL – Service Desk roles and responsibilities

The key to an effective Service Desk is ensuring that there is clear accountability and that roles are defined so as to carry out the practice of Service Operation. A role is often tied to a job description or work group description, but does not necessarily need to be filled by one individual. The size of an organisation, how it is structured, the existence of external partners and other factors will influence how roles are assigned. Whether a particular role is filled by a single individual or shared between two or more, the importance is the consistency of accountability and execution, along with the interaction with other roles in the organisation.

The following roles are needed for the Service Desk.

### Service Desk manager

In large organisations where the Service Desk is of a significant size, a Service Desk manager role may be justified, with the Service Desk supervisor(s) reporting to him or her. In such cases, this role may take responsibility for some of the activities listed above, and may additionally perform the following activities:

- Manage the overall desk activities, including the supervisors;
- Act as a further escalation point for the supervisor(s);
- Take on a wider customer service role;
- Report to senior managers on any issue that could significantly impact the business;
- Attend change advisory board meetings;
- Take overall responsibility for incident management and request fulfillment on the Service Desk. This could also be expanded to any other activity taken on by the Service Desk – e.g. monitoring certain classes of event.

Note: in all cases, clearly defined job descriptions should be drafted and agreed so that specific responsibilities are known.

### Service Desk supervisor/Senior Service Desk analyst

In small desks it is possible that the Senior Service Desk analyst will also act as the supervisor – but in larger desks it is likely that a dedicated Service Desk supervisor/Senior Service Desk analyst role will be needed. Where shift hours dictate, there may be two or more post holders who fulfill the role, usually on an overlapping basis. The supervisor/senior analyst role is likely to include:

- Ensuring that staffing and skill levels are maintained throughout operational hours by managing shift staffing schedules, etc;
- Undertaking HR activities as needed;
- Acting as an escalation point where difficult or controversial calls are received;
- Producing statistics and management reports;
- Representing the Service Desk at meetings;
- Arranging staff training and awareness sessions;
- Liaising with senior management;
- Liaising with change management;

- Performing briefings to Service Desk staff on changes or deployments that may affect volumes at the Service Desk;
- Assisting analysts in providing first line support when workloads are high, or where additional experience is required.

### Service Desk analysts

The primary Service Desk analyst role is that of providing first level support through taking calls and handling the resulting incidents or service requests, using the incident management and request fulfilment processes, in line with Service Desk objectives.

**From the Service Operation section<sup>13</sup> of the UCISA ITIL for the HE community Best Practice Guide (2010)<sup>14</sup>**

## 3.2 Job descriptions

Every person working on the service desk should have a job description that accurately describes the skills, competency requirements and responsibilities of their role. This means that they must be regularly reviewed and updated to ensure that they keep up with the changing nature of the service desk. Job descriptions should not just be used for recruitment but should also form part of the performance and development processes. Ideally job descriptions should be published in a central repository so that they can be easily located. It is important to work closely with HR to ensure that the process for reviewing and updating job descriptions aligns with university procedures and policies.

## 3.3 Resourcing and staffing levels

Different service desks will require different levels of resources to cover not only the service hours but also the differing demands and service levels. There are many different ways of forecasting and predicting resourcing requirements and managing shift patterns and rotas, there are some software products available but spreadsheets and calendars can also be useful resourcing tools. It is recommended that you review data from both the ITSM tool and telephony systems as this can provide a useful insight into peak service demands. Resourcing to the right level can be challenging, but is critical in providing an efficient and effective support function.



Large organisations often make use of a set of workforce management tools in order to effectively match resourcing requirements with customer demand. The ability to flex up during times of high demand is a challenge for any organisation, however until you fully understand the usual pattern of activity across your busy and quiet periods, it is not possible to accurately forecast the impact of any unusual activity, or respond accordingly.

A sound knowledge of your resourcing and scheduling needs, coupled with some service forecasting also facilitates better strategic decision making. For example, if you are considering making changes to service desk support channels, and increasing uptake of your self-service portal, understanding user behaviour and workload peaks and troughs can help you to predict the most likely impact in terms of freeing up or reducing analyst availability. Forecasting facilitates better decision-making around reducing or redirecting all service desk activity - for example, in this scenario taking a decision to devote more time to allowing analysts to work on producing knowledge, self-help or other value-add activities.

<sup>13</sup> From the Service Operation section of UCISA (2010) ITIL for the HE community Best Practice Guide [www.ucisa.ac.uk/representation/activities/ITIL/serviceoperation](http://www.ucisa.ac.uk/representation/activities/ITIL/serviceoperation)

<sup>14</sup> UCISA (2010) ITIL for the HE community Best Practice Guide [www.ucisa.ac.uk/publications/itil](http://www.ucisa.ac.uk/publications/itil)

Service Desk - Year on Year Logged calls

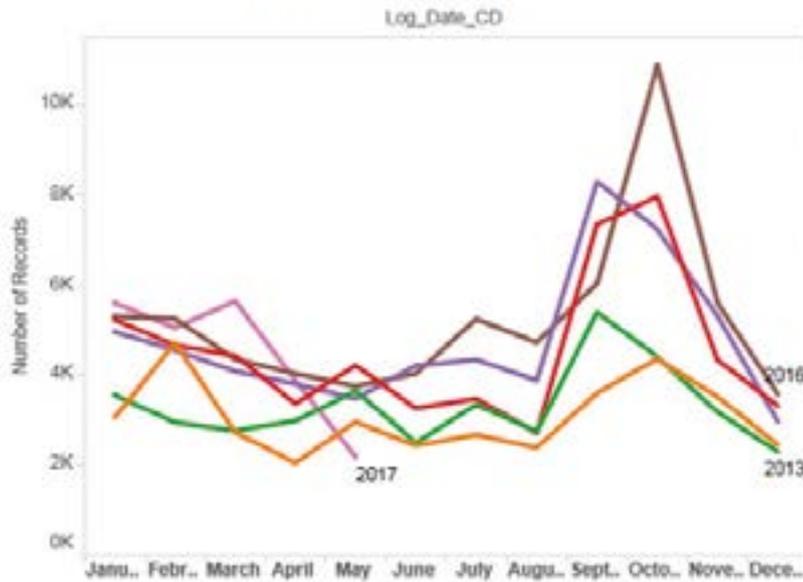


Figure 1: Example of call trends by month and by year from Lancaster University IT Service Desk

### 3.3.1 Shift patterns and rotas

Having enough of the right kind of staff on duty is key to shift and rota management and it is worthwhile to spend time getting your shift patterns and rotas right. Each service desk will have a different set of requirements, needing varying numbers of staff on different days and times of the week and different skill sets. If you are hiring staff to work shifts at different times and days of the week you should attempt to set your staff shift patterns in as static a pattern as possible to attract and retain staff and give consistency to your service.

Rotas should be reviewed regularly to ensure you have adequate staff on duty and you should give clear guidance to all staff, making clear the person/s responsible for rota changes, any rules around shift swaps and what people should do in the event someone does not appear for their duty or where there is sickness absence.

#### Edge Hill University Example Rota

|           | Early (8am - 4pm) | Late (10am - 6pm) |
|-----------|-------------------|-------------------|
| Monday    | IR                | EC                |
| Tuesday   | JJ                | MW                |
| Wednesday | EC                | JJ                |
| Thursday  | MW                | IR                |
| Friday    | EC/JJ/MW*         | IR                |

\*Friday mornings are rota'd as a separate entity

Note that the 'Early' at 8am and the 'Late' until 6pm are guaranteed by the above table. All staff work flexi hours providing they cover their agreed commitment(s)

In vacation times, we finish at 5pm and the 'late' rota is not used

In the event of a week (or more) planned leave, cover is arranged by the Customer Service Manager. When under a week is involved, local 'swaps' are arranged.

## Manchester Metropolitan University rota

Monday – Friday, 8am – 5pm, excluding bank holidays and holiday closures:

### 1) Early shift

- a. Start: 8am
- b. Morning break: 9.30am – 9.45am
- c. Lunch break: 11.45am – 12.30pm
- d. Afternoon break: 2.30pm – 2.45pm
- e. Finish: 3.45pm

### 2) Middle shift

- a. Start: 8.45am
- b. Morning break: 10.15am – 10.30am
- c. Lunch break: 12.30pm – 1.15pm
- d. Afternoon break: 3pm – 3.15pm
- e. Finish: 4.30pm

### 3) Late shift

- a. Start: 9.15am
- b. Morning break: 10.45am – 11am
- c. Lunch break: 1.15pm – 2pm
- d. Afternoon break: 3.30pm – 3.45pm
- e. Finish: 5pm

There are 3 service desk advisors on each shift and the shifts rotate on a weekly basis.

Correct break times must be adhered to in order to maintain appropriate staffing levels at all times; breaks outside of scheduled times are allowed on emergency basis only.

- 4) Student-only shift operated by specially trained students (IT Rovers), who have full skills and knowledge to handle incoming queries from students (only). These shifts typically last up to 3 hours a day during the busiest periods (term time only, one IT Rover per day), to improve our response time and provide friendly peer-to-peer service specifically designed for students.

### All other times

- 5) Out of hours support handled by the NorMAN Helpline from the University of Northumbria.

## Rotas and staffing levels, IT Service Desk University of Leeds

The core IT Service Desk hours during term time are Mon – Fri 08:00 to 21:00 and in order to cover these opening times the IT Service Desk day team will work alternating shift pattern to cover the core hours as follows;

Early Shift: 07:45 – 15:45 (1 hour for lunch)

Mid Shift: 09:00 – 17:00 (1 hour for lunch) – shift is specifically for Remote Support function

Late Shift 09:45 – 17:45 (1 hour for lunch)

The Remote and Out Of Hours Team cover the extended hours from 17:45 to 21:00 weekdays and 12:00 – 17:00 on Saturdays and Sundays. Staff working in this team have varying hours and days on a part time basis.

The IT Service Desk will operate will lower staffing levels during summer vacation (mid June until early September) and during this period core hours are reduced to 08:00 – 17:00. However critical events in the University calendar such as Confirmation & Clearing will be supported with increased hours where necessary.

## Rota and staffing levels, IT Service Desk Leeds Beckett University

Leeds Beckett University IT Service Desk opening hours are 08:30 - 18:00 Monday - Friday.

The team are split across 2 sites and into 2 shifts, early and late all with a 30 minute lunch break;

Early: 08:15-16:15 (Monday - Thursday) 08:15-15:45 (Friday)

Late: 10:15-18:15 (Monday - Thursday) 10:45 - 18:15 (Friday)

The early shift starts 15 minutes before the service opens to allow time to open up and log in to systems with the late shift finishing 15 minutes after the service closing to allow time to close up and ensure we are not ushering customers out of the door. Friday working hours are 30 minutes shorter for all staff so the shifts are staggered accordingly to cover core service hours. In the summer holidays when the number of incidents and requests subside it can be more useful to reduce service hours to increase staffing within core hours to undertake proactive work, training and job shadowing.

We also offer a walk in and media equipment loans service and therefore have to have a manned triage desk at each site. Each analyst is rota'd to do 2 half days a week covering this part of the service.

### 3.3.2 Breaks and lunches

Service desk staff should be encouraged to take a rest break during their shift and these should be provided in recognition of the busy environment and high workload. Service desk staff should be encouraged to take time out away from their desks during lunch and break times; this will also ensure that they do not disrupt other colleagues who are working.

### 3.4 Student placements: apprenticeships and work experience

Working in the higher education sector we are in a privileged position to have a valuable staffing resource at our fingertips. With a number of courses now offering industrial placement years the service desk can utilise university work placement schemes and policies. This kind of work experience brings many benefits to both the student and the service desk.

The student gains valuable work experience improving their chances of employment when leaving university. For the service desk you get a member of staff from the user community who can provide a useful insight into student experience. Other benefits to the service desk include a regular refresh of staff (which can keep the team from stagnating and improves the team dynamic). It can also be empowering for permanent staff to train new additions to the team. There is also a fully trained candidate should a permanent position arise once the student has graduated. For the university, it shows a positive culture of helping and promoting students as well improving the courses placement statistics (and therefore ability to attract future students).

Some universities also take on short-term school placements, this can foster local community ties and encourage secondary and high school students to pursue higher education and improve future student recruitment figures.



# 4 People

## 4.1 Recruitment and selection

Standard university recruitment processes may not always meet the specialist needs of the service desk environment. Some service desks utilise different recruitment methods such as role play, telephone interviews and psychometric testing, to ensure that they have the right people doing the right job. Some of the key benefits of employing the right people include improved productivity, increased morale, improved customer satisfaction, better delivery of services and better staff retention.

### Manchester Metropolitan University - Service Desk recruitment

As a small team with an ambitious vision, our people are the most important assets and critical success factors in achieving the mission of the IT helpline. The Service Desk advisor role has one of the highest turnover rates in IT Services as we encourage our staff to develop and progress into other areas of IT while supporting internal progression.

Our Service Desk advisors undergo a rigorous selection process, consisting of:

- Application and shortlisting stage, with up to 10 applications per each shortlisted candidate;
- 30-minute formal interview;
- 10-minute role play;
- 20-minute group activity;
- 30-minute informal tour of the office and meeting the existing team.

We aim to also involve representatives from our second and third line teams, and a representative of our customer population in the selection panels, to ensure an all-round view and assessment of the candidates.

**Group activity** - A group activity is a great way of seeing peer-to-peer interaction amongst candidates in a relaxed environment, but can also act as a good ice-breaker before the interview.

A good scenario can include any type of a teambuilding activity or a simple problem solving task for 3-5 candidates at a time. The completion of the task is not important; the panel should be observing the candidates' communication and listening skills, their ability to clearly express themselves and their attitude to teamwork and working with others.

**Telephone role play** - The role play involves a scenario where the candidate receives a simulated phone call about an IT issue that requires troubleshooting and logging in a service management system.

The scenario needs to be a generic IT issue that does not require organisation-specific knowledge (for example network connection).

The panel observes and marks the candidate on their communication skills, telephone manner, questioning ability, typing and note-taking skills and general technical awareness.

**Tour of the office** - This opportunity gives the candidates and the existing team members a chance to informally socialise and get to know each other, without the presence of the interview panel or manager. This part of the selection process is not formally marked but it does allow the candidate to decide whether they want to be part of our team and office environment, and it allows the existing team members to be involved in the process.

Job adverts should be written in such a way as to provide emphasis or highlight aspects of the role that are not prominent in the job description and to attract candidates from BME groups. When writing a job advert for a service desk vacancy start by putting yourself in the reader's shoes. What information do they need to know to help them decide whether to apply for the advertised role? It is really important to market your vacancy to right type of candidates.



#### VIEWPOINT

“Our process is to ask up to six behavioural type questions, and for my posts I also ask some technical questions. Then each of the interview panel grades the quality of the question and then we agree as a panel what overall score we agree to give each question.”

**Kath Murray, Helpdesk and ITAV Team Lead, Robert Gordon University**



## 4.2 Induction and probation

Effective induction and probation for service desk staff will give individuals the opportunity to develop the necessary skills to carry out the role effectively and to develop their career. At the same time, it enables the university to assess the contribution of a new member of staff and to ensure that they fulfil the requirements of the post. Probation should be seen as a period of training for the individual, with consequential benefits to the department and university. Probation should also be used to set goals for development and identify what support and training is required.



### VIEWPOINT

“All University of Edinburgh staff follow an induction and probation period. Staff on grades one to five have six months’ probation, and staff on grades six to ten have one year of probation. Information Services run their own induction programme which we have combined with our team specific induction programme to provide a full induction for new IT Support staff.

Our staff deliver both first line support and second line desktop and application support so the induction programme attempts to give an introduction to all aspects of the role as a basis for building a more comprehensive understanding as the staff member progresses in their role.”

**Lisa McDonald, User Support Manager, University of Edinburgh**



### VIEWPOINT

“At Manchester Metropolitan University, the formal Service Desk induction lasts two weeks and a probation period 13 weeks, with monthly reviews to discuss the individual’s progress and identify further support and training requirements. Induction training is carried out by existing team members and new starters are assigned a ‘buddy’. This is a great opportunity to integrate new starters into the team quickly, but it also provides a development opportunity for existing team members to organise and deliver induction training sessions, as well as informally coach their peers. Probation reviews are conducted by the manager, following the University HR process.”

**Martina Holubcova, Service Desk Manager, Manchester Metropolitan University**

## 4.3 One to ones

One to ones are a very useful exercise, not only for the staff member, but for the manager too. Introducing one to ones for your team is something which will have a positive effect on staff morale and will greatly enhance your own understanding of your team’s needs.

A good one to one acts as a key part of ongoing personal and professional development. It will give the staff member a forum to review their performance, celebrate their achievements, review things that did not go so well and learn from them. Most importantly it gives the staff member a voice, allows their opinions to be heard and allows them to contribute ideas and experience to build a better service. All of this can greatly increase morale in the team and ensure that the manager is able to deal with any issues quickly and effectively – the sooner you know about something the sooner you can fix it and everyone can move on.

In an ideal world the line manager would conduct one to ones with all team members, however in larger teams this is not always possible due to time constraints. In these situations, you should empower your supervisors and staff looking to gain more experience of people management by allowing them to conduct one to ones with colleagues (providing all involved are happy with the situation). This can work very well because people are sometimes more comfortable speaking with a peer. If possible you should try to ensure that the person holding the one to one is also responsible for the staff member’s annual development review so that there is year round dialogue on staff development. If you do have a matrix model for one to ones you should build in catch up meetings with your supervisors so that you can review one to one actions together – these should be separate to the supervisor’s personal one to one meeting with you.

It is important to understand that not all staff will want the same thing from a one to one and it may make sense to schedule one to ones at varying patterns (for example senior staff might want to have a monthly one to one, but more junior staff may only need a quarterly one to one). To get the most effective outcome you should implement a

framework which can be adapted to suit the needs of all of the team, but one which still allows the manager to get what they need from the one to one process. Some themes you might want to consider include:

- general workload;
- review of last period's calls;
- special areas of responsibility;
- project work;
- personal development needs
- anything else the person wishes to raise.

Some institutions, especially those with larger service desks, have a one to one proforma.

## 4.4 Training

Typical service desk training plans will include service desk analyst and customer service training and the ITIL Foundation Certificate. Once official training has been completed it can be useful to provide refresher sessions or give people the opportunity to take time out to enhance or fine tune what they have learnt. Appraisal and performance reviews should include a full evaluation of any training and development that has taken place in the past twelve months. The process will also result in the production of a full personal development plan for the coming year which should identify further training for both personal and job related development.

To ensure that service desk staff can provide customers with the best service possible you must invest in them. One key way to do this, to enhance their skills, is to provide them with customer service focused training.

Some organisations choose to draw up a training plan to document their overall training strategy. These plans support the development of staff and are used by the service desk manager, supervisors/team leaders and analysts to ensure all staff are trained to a required standard. Some examples of popular training courses available are:

### 4.4.1 SDI Service Desk Analyst and STI Service Desk Professional

The Service Desk Institute's analyst training is an internationally recognised service desk analyst qualification<sup>15</sup>, which is based on industry professional standards covering areas such as IT service management best practices, roles and responsibilities of service desks, problem solving, quality assurance and excellent customer service skills. This training, and the STI service desk professional<sup>16</sup>, provides an understanding of the role and responsibilities of a service desk analyst and an understanding of the role the service desk plays in any organisation. This gives an overview of the importance of meeting commitments and delivering service excellence as well as looking at the attributes, skills, knowledge required to be a successful service desk analyst.

### 4.4.2 ITIL Foundation

ITIL Foundation provides a general awareness and understanding of the key elements, concepts and terminology used in the ITIL service lifecycle, including the links between lifecycle stages, the processes used and their contribution to service management practices. Service desk staff can use this training to directly correlate ITIL processes to their role to provide a more efficient and effective service<sup>17</sup>.

### 4.4.3 Internal courses

Some organisations also provide internal training via an onsite training team. These can offer various courses to enhance a variety of skills. Key areas to consider are: technical and application-based training; information security training; improving soft skills; time management; customer service; leadership and management training; dealing with difficult situations/customers and presentation skills.

<sup>15</sup> [www.servicedeskintstitute.com/training--and--qualifications/service-desk-analyst/](http://www.servicedeskintstitute.com/training--and--qualifications/service-desk-analyst/)

<sup>16</sup> <https://www.sti-ltd.co.uk>

<sup>17</sup> [www.axelos.com/certifications/itil-certifications/itil-foundation-level](http://www.axelos.com/certifications/itil-certifications/itil-foundation-level)

## 4.5 Appraisal and performance reviews

Appraisal and performance reviews provide an opportunity to look back at the contribution that has been made by an individual and to look forward and make plans for the coming twelve months. Appraisals should provide a forum for assessing an individual's performance as well as an opportunity to look at the support and guidance they require to continue to perform. The process should consist of two parts; firstly to conduct a review of the past six or twelve months, which should be a two way discussion about what has been achieved. This can be used to reflect what has gone well and what has not gone so well and in both cases to analyse why. The second part of the process should incorporate a discussion around objectives and plans for the coming twelve months. The result will be a summary of feedback covering both good performance and areas for development. The planning part is about looking forward and setting objectives and agreeing on training and support needs. It should also be used to discuss career aspirations and development.



### VIEWPOINT

“Staff are given an annual development review where they discuss their professional and personal development. This is an hour long conversation about the achievements that have been made over the last year and the benefits they've brought to both the individual and the wider service we deliver. We also discuss things that didn't go so well and any training that wasn't completed, then finish by setting new personal and professional objectives for the coming year along with timescales for completion. Annual development review actions are discussed at regular one to ones, this allows us to ensure staff development is an ongoing activity as opposed to an annual 'form filling' exercise.”

**Lisa McDonald, User Support Manager, University of Edinburgh**

## 4.6 Professional development

Professional development can be a great motivator for people and it is important to develop a culture and working environment that gives people the opportunity to learn new skills and improve their knowledge. It is possible that in more traditional organisations, service desk staff may still be seen as the *Cinderellas* of IT, or the desk is viewed simply as a springboard into other IT roles. Therefore, it can be beneficial to ensure that roles within service desk are as varied and interesting as possible. This can be something as simple as ensuring that everyone has an opportunity to work in the different areas of the service; phone, face to face and email or taking it turns to work on project and development activities.



### 4.6.1 Secondments

Service desk management should aim to provide career development by supporting secondment opportunities. Secondments are a planned, voluntary and temporary transfer of an individual from one role to another for a time limited period. Secondments may take place within the same team, department or organisation or to a completely different organisation. Secondments vary in terms of length and objectives but should give people access to experiences and opportunities outside of their current role.

### 4.6.2 Job shadowing

It is important that senior leadership within IT and the service desk management team encourage as much interaction between the different support areas as possible. This will break down silos and increase cross team collaboration. Shadowing and spending time with other teams helps to strengthen teamwork and rapport, and also increases the knowledge and skills of the service desk staff. Service desk staff should be encouraged to participate in job shadowing to provide additional resource to other support teams, to improve working relationships across different teams and where a staff member has a particular interest and job shadowing that forms part of the personal development plan.

### 4.6.3 Career development portfolios

Career development portfolios are intended to help people gain experience and skills outside of their current role, in the expectation that this could benefit them in career progression. Career development portfolios will outline some of the IT progression paths that may be of interest to individuals within the service desk team and will highlight the skills and knowledge required for these roles. Where possible individuals will be provided with structured programmes of support to help them gain knowledge and skills (which may include having a mentor or coach, job enrichment, job shadowing, job rotation or swapping, secondments, study leave and formal training courses). Formal frameworks such as SFIA<sup>18</sup> can be helpful in understanding the various career paths within IT.

### 4.6.4 Personal development plans

Personal development plans provide an ideal way of recording agreed areas to develop and actions to support this development. They can also be used to monitor progress and to discuss whether the development has achieved what it planned to achieve. It is important to be clear who will be responsible for ensuring that agreed actions are put into practice in line with agreed timescales and individuals will have ownership of their own personal development actions.

### 4.6.5 Conferences and industry events

Attendance at conferences and industry events is also a very useful development tool for staff and can provide an opportunity to discuss current issues and trends, customer expectations, new tools and technologies, and gain insight on the changing nature of the service support industry, allowing staff to network with other service desks and gain a new perspective on their roles. Those of particular relevance include the SDI Annual Conference<sup>19</sup> and SDI/HE Special Interest Group event<sup>20</sup>, the UCISA Support Services Annual Conference<sup>21</sup>, SITS<sup>22</sup> and ITSME<sup>23</sup> events.

### 4.6.6 Coaching and mentoring

Coaching and mentoring are two additional methods you may decide to implement, in order to improve job satisfaction and professional development.

The open source SDI Service Desk Manager standard<sup>24</sup> defines both coaching and mentoring and outlines the benefits of each:

- coaching is a process of learning and developing competent performance in the workplace, usually through regular structured sessions between a suitable coach and a 'coachee'. It is performance and task-related.
- mentoring is defined as a supportive learning experience, in which an experienced person shares the benefits of their knowledge, experience and wisdom. They might act as a role model, confidante, guide or tutor. Mentoring is a long term approach, requiring mutual trust.

Many larger organisations implement institution-wide mentoring schemes, designed to connect suitable people together. More local, practical coaching and mentoring opportunities often occur within the service desk environment. Common techniques include call coaching, peer review coaching, service desk buddy schemes and defining designated subject matter experts.

### 4.6.7 Additional responsibilities

Giving people the opportunity to step into leadership roles or take on further responsibilities is also a useful way to reward their performance and can also help identify future promotable people. Most people are stimulated by leadership roles, even through the delegation of management activities or roles on short term basis such as covering for annual leave. It can be useful to appoint project leads or champions from within the service desk who can act as the main point of contact and represent the service desk at project meetings. This is a great way for individuals to be given additional responsibilities and gain valuable experience.

18 <https://www.sfia-online.org/en>

19 <http://servicedeskintstitute.com/events/>

20 <https://www.servicedeskintstitute.com/events-networking/>

21 [www.ucisa.ac.uk/events](http://www.ucisa.ac.uk/events)

22 [www.servicedeskshow.com](http://www.servicedeskshow.com)

23 [www.itsmf.co.uk/events/event\\_list.asp](http://www.itsmf.co.uk/events/event_list.asp)

24 [www.servicedeskintstitute.com/standards/](http://www.servicedeskintstitute.com/standards/)

## 4.7 Open door management

Managers who demonstrate high levels of accessibility are more likely to have a team that feels comfortable in stopping by for a quick chat to bring issues, difficult situations and ideas to the attention of their managers. Open door managers have a better understanding of what is happening within the team on a daily basis and an open door policy ensures that individuals have easier access to informal discussions that can lead to really important insights into the team and the service. The service desk management team should promote a culture of friendly openness, fostering closer relationships with staff and building a stronger team. A closed door can generate a feeling of negativity and formality within the workplace as well as a culture of secretiveness which can have an impact on relationships. The service desk management team can promote a culture of open door policy by making themselves available to individuals on a formal and informal basis.



## 4.8 Code of conduct and behaviour guidelines

In order to achieve high quality, professional service standards, service desk staff will need to demonstrate excellent customer service and people skills, problem solving, analytical and technical ability and sound business knowledge. Good customer service does not just happen and so it can be useful to establish guidelines and principles to which all staff should relate and adhere to. A good code of conduct will not only define the standards of professionalism and behaviour that service desk are expected to adhere to, it will also provide a framework for a consistent service.

### University of Leeds IT Service Desk code of conduct – timekeeping

Staff are expected to be ready to work at the start of their shift by arriving at the office before their shift starts; allowing time to store personal items and begin work on time. Lateness is documented and monitored (even if only a few minutes) and staff are expected to work the time back.

Customers expect us to be open on time; the early shift starts 15 minutes prior to opening time to allow staff to complete opening procedures and be ready to accept calls, answer emails and deal with walk-in queries at 8:00am. Staff should inform senior staff and line managers if they are going to be late.

Overtime will only be granted by prior agreement with a line manager. The normal expectation is that any excess time worked is given back as time off in lieu.

### 4.8.1 Absence reporting

Most universities will have a HR policy for reporting staff absence but this may not always meet the specific needs of the service desk who have to ensure staff are available to provide adequate service levels. It can be useful to define and document a process for absence reporting for the service desk team but you should liaise closely with HR to ensure that this complements rather than contradicts university policy.

## Manchester Metropolitan University IT Service Desk code of conduct - sickness reporting

Everyone working on the helpline is required to inform the manager of any sickness absences no later than 1 hour before the start of their shift (i.e. by 7am for the early shift and by 8.15am for the late shift), at the beginning of each day of absence until they are back at work (long-term sickness follows an individually agreed protocol).

The manager can be informed via any of the following ways:

- phone call
- text message
- Whatsapp message
- email

For sicknesses longer than 1 week, a doctor's note is required.

For all sickness absences, a "return to work" interview and form has to be completed together with the manager upon return to work.

### 4.8.2 Dress code and personal hygiene

Dress codes can be used to provide service desk staff with guidelines about what is appropriate to wear for work. The level of informality and formality will depend on the culture of the university and department and the level of contact the service desk team have with users. Staff work in close proximity to one another, and may also come into direct contact with customers so personal hygiene is important. When implementing a service desk uniform or dress code it is important to ensure that staff are able to reflect their ethnicity, culture and religion and there is an approach that enables staff to present a professional image within a framework of embracing equality, diversity and individuality.



“The Leeds Beckett University IT Service Desk provides a walk in service for both staff and students across two campuses and they also attend callouts to deal with classroom and lecture theatre IT AV issues. The Service Desks are located in the two libraries and because of the customer facing nature of their role it was felt that branded work wear could be used to differentiate between the other service staff working in the library. Other benefits were identified as:

- **Improved identity** – used to create a brand and an identity that would make Service Desk staff easily recognisable by staff and students.
- **Professionalism** – helps create a good first impression.
- **Marketing** – create some additional advertising and promotion of the IT Service Desk.

It is important that all staff are able to reflect their ethnicity, lifestyle and culture and that we embrace the University’s values of equality and diversity and so we offered a selection of different of garments. Oxford navy (blue is the colour of service) was chosen as the colour, and all garments were embroidered with “IT Service Desk” and the University logo.

Staff were given a choice of four items from a range of t-shirts, blouses, hoodies, polo shirts and shirts. If any member of the team had a preference for something that wasn’t in the offered range (such as fleece or a zip up hoodie) they could make a purchase themselves and wear for work as long as it was in Oxford navy and was branded appropriately. Staff could also purchase additional garments if they wished.

By taking a collaborative approach, and providing options that supported personal choice and preferences, we were able to successfully implement this, with the team positively and enthusiastically embracing the change.”

**Alex Allen, Service Desk Manager, IT Services, Leeds Beckett University**

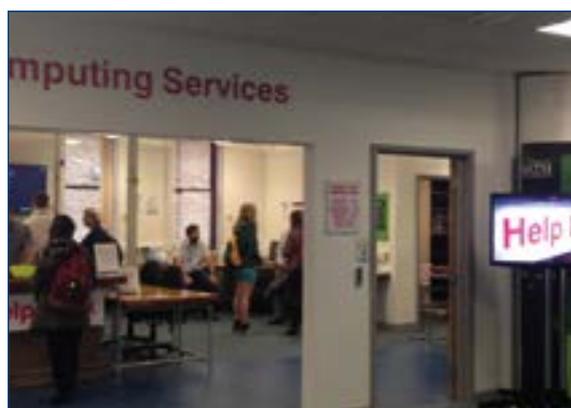


Copyright © Leeds Beckett University

Photo 1: IT service desk team, Leeds Beckett University

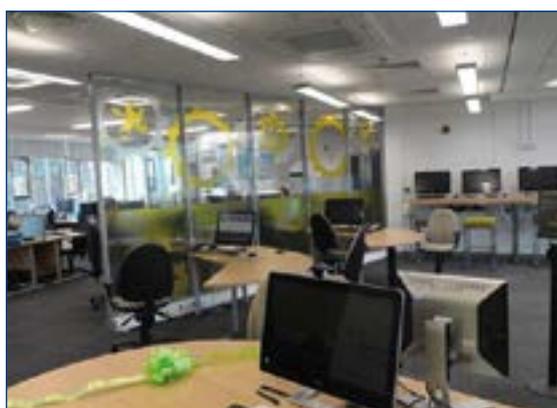
### 4.8.3 Working environment

It is important that office space is maintained to a good standard of tidiness and cleanliness, particularly if your service desk is customer-facing. It can be useful to define and document guidelines such as clear desk policies to ensure that working environments provide a welcoming and safe place to work. Where possible personal belongings should be kept in lockers or suitable storage to reduce tripping hazards and risk of loss or theft and ensure we are complying with health and safety regulations.



Copyright © University of Bath

Photo 2: Help desk area



Copyright © University of Leeds

Photo 2: View of the service desk

#### 4.8.4 Stress management

The service desk environment is often a busy and pressurised place to work; stressful situations can and do arise. It is therefore important that service desk staff are encouraged to recognise signs of stress within themselves and colleagues, and that they are empowered to take action to minimise it. After a difficult call or situation service desk staff should be encouraged to take a short break, perhaps get some fresh air or just have a walk along the corridor. It is important that service desk staff are aware of how to raise issues to ensure they receive the required support. Service desk staff should be encouraged to use breaks and lunchtimes to rest and take in sustenance in order to maintain wellbeing and reduce the impact of stress.



*“In a busy and demanding environment such as a service desk, having an office radio and playing background music can sometimes have a calming effect on people, creating a relaxed atmosphere.”*

Martina Holubcova

#### 4.8.5 Dealing with abusive customers

Whilst the nature of the service desk means that staff may have to deal with irate and upset customers from time to time they should recognise that in most cases this is a response to feelings of frustration with IT issues and problems. If any member of the team is finding a particular interaction difficult they should feel empowered to be able to consider handing over to another member of the team or escalating to either a more senior member of staff or a manager. It can also be useful to provide advice and guidelines for how service desk should respond to a user if their behaviour becomes abusive or threatening.

##### University of Leeds IT Service Desk handbook (excerpt)

**Telephone calls** - give a verbal warning and advise the customer that if they continue with their abusive behaviour you will discontinue the calls. If it then continues terminate the phone call by hanging up and report the issue to a manager soon as possible. This can be escalated if appropriate.

**In person** - give a verbal warning and advise the customer that if they continue with their abusive behaviour you will ask them to leave/or will leave. If the behaviour continues ask them to leave the office or walk away if you are visiting them. Escalate to management immediately.

**Email** - Escalate any email with inappropriate or offensive content to management who can refer the matter to the senior management team.

## 4.8.6 Mobile phone and internet usage

In a customer-facing work environment, it can be useful to define policies for the use of the internet and mobile phones during work hours.

### Leeds Beckett University IT Service Desk code of conduct (excerpt)

Mobile phones should be switched to silent during work time so as not to cause undue noise and interruption and they should not be used during working hours. We are expected to keep mobile phones out of sight i.e. not on desks.

If you need to make a call you should step outside the office so as not to disrupt others who are working. If personal issues mean that a mobile phone needs to be out then this must be discussed and agreed with your line manager. Use of work phones for personal calls should only be in exceptional circumstance and with prior agreement from a line manager.

Internet usage for personal reasons may be done during breaks and lunch but should not be in view of customers or disruptive to other staff who are working. The PCs in the IT Service Desk must not be used for this purpose. Constant flicking between personal email/non-work related web sites and work related screens whilst handling enquiries is unacceptable. Remember that each person that contacts us deserves our undivided attention and mobile phones and web surfing can distract us from truly focusing on our users' needs.

## 4.8.7 Expected behaviours

For most users the only contact they will have with the service is through the service desk so the entire impression they form is through their interaction with service desk staff. There is only ever one chance to make a first impression and it is imperative that this is a positive one. Users see the service desk as the face of the service and their perception of it is determined by the quality of the service they receive from the service desk. Defining standards of behaviour can help to ensure that the team understand what is expected of them and their interactions with each other, other IT colleagues and customers and users.

### University of Leeds IT Service Desk code of conduct

All IT Support advisors must demonstrate a service attitude at all times. This includes:

- Taking ownership of a user's incident or request and seeing it through to resolution or referral;
- Conveying a genuine willingness to help;
- Increasing user confidence through a professional and positive attitude;
- Treating all users with respect and courtesy;
- Focusing attention on the user and the resolution;
- Keeping users informed;
- Giving accurate information without apportioning blame;
- Do not 'fluff' your way through. If you don't know the answer seek guidance;
- Understand the business need whilst also focusing on a solution for the user;
- Focusing on business needs while also providing users with best possible service;
- Demonstrate a flexible approach;
- Take personal accountability – admit to mistakes and errors;
- Follow the documented processes and procedures;
- Providing the same level of quality and service to all users in order to remain fair and consistent.

### Leeds Beckett University IT Service Desk service attitude

- Personal attitude - polite, friendly, enthusiastic, confident and helpful;
- Have empathy - put yourself in the customer's shoes, what does their issue mean to them;
- Honour commitments - keep our promises and do what we say we will do;
- Fair and consistent, respect and courtesy - all customers should receive the same quality of customer service, treat every single person with respect and courtesy;
- Personal ownership - don't pass the buck, don't blame others, see things through to the end;
- Personal accountability - admit to errors, be honest about mistakes or lack of knowledge, be clear about what you can deliver;
- Set expectations, keep users informed and updated, if you don't know the answer say so, if we can't deliver something say so, if we don't know when something is going to be fixed say we don't know;
- Be flexible and adaptable - lots of changes coming, got to keep up with changing technologies;
- Teamwork – share ideas and work towards a common goal;
- Develop knowledge and skills – take responsibility.

#### 4.8.8 Mutual dignity and respect

Most universities will have a mutual dignity and respect policy to protect staff and student and this must be reflected in any code of conduct process or procedure.

#### University of Leeds Mutual dignity and respect policy

The University of Leeds believes that every member of staff has the right to work in a supportive environment, free from harassment, bullying and victimization. Similarly, every student has the right to study and be taught in an environment that is supportive and free from such behaviours.

#### 4.9 Managing leave requests

Most service desks will follow guidelines and procedures outlined by their institution's human resources department, with local discretion applied. Required staffing levels will be determined by the demands of the service and the service levels required, and these are likely to vary across the academic year due to peaks and troughs in workload. In order to ensure service levels are met (in addition to any HR policies and practices) it may be useful to define a process for requesting and managing annual leave for service desk staff.

## University of Leeds Requesting Leave Policy

Annual leave requests should be made at least 1 week in advance and staff should consult the team calendar to check availability prior to making a request. During peak service times only two people will be granted annual leave at any given time. Peak times are identified in the team calendar. Leave requests for daytime staff are processed through the online self-service interface. Once received, the request will be accepted or rejected by a line manager and added to the team calendar. Remaining holiday allowance can be viewed within the system. Leave requests for evening/weekend staff are managed via email to their line manager. Urgent requests will be dealt with by the line manager on an individual basis.

Leave may be granted for other reasons, such as Compassionate or Carer leave. University policy will be followed for such requests.

### 4.10 Skills matrices

The skills matrix<sup>25</sup> is a useful induction and training tool, allowing staff to identify their strengths and areas where they require more knowledge, training or support. It includes both technical and interpersonal skills and should be reviewed throughout induction for new staff and at annual development reviews for existing staff.

The skills matrix is also a useful service management tool. It can be used to identify team wide training needs and to ensure there are enough staff with the correct level of understanding to support all of the services. One way of doing this is to perform a gap analysis reviewing the overall team skill level for each service and scheduling either individual or team training sessions to bridge the gap. You can use staff who have scored highly in their skills matrix to deliver this training, giving them an opportunity to share their experience and gain satisfaction from contributing to improving the service. Involving other second and third line teams in training can not only improve the service and staff knowledge, but also works as a good tool for improving cross team relationships.

The skills you include in your skills matrix will depend on your organisation, but it is common to use a combination of high level technical skills and soft skills expected of the role, or it can be primarily based on services in your service catalogue.

To remain accurate, your skills matrix should ideally be reviewed and updated quarterly or at least annually. It is common to utilise a range of skills evaluation methods. These may include staff self-assessment, peer reviews, management reviews and technical or procedural tests.

The scoring for individual skills can either be a simple “check” (i.e. meets / does not meet), or a multi-grade scale. The following grades are used at Manchester Metropolitan University, for example:

|   |                 |   |
|---|-----------------|---|
| 0 | No knowledge    | Can't perform related tasks                         |
| 1 | Basic awareness | Can perform tasks with help from others             |
| 2 | Fully trained   | Can perform tasks independently and can help others |
| 3 | Expert          | Can work proactively and confidently teach others   |

<sup>25</sup> [https://en.wikipedia.org/wiki/Skills\\_management](https://en.wikipedia.org/wiki/Skills_management)

## 4.11 Reward and recognition

Investing in people is the underlying message of reward and recognition, as is appreciating and recognising people for the things that they have accomplished, particularly where this contributes to improved service delivery or/and customer experience. In order to keep the service desk team motivated it is important that good performance is recognised and acknowledged. Sometimes this can be as simple as saying “well done”, something that is often overlooked. People do value being praised, especially if you do this in a timely way.



### 4.12.1 Awards

In order to recognise and reward good performance it is important to celebrate success. Industry awards and events are a great way of promoting the service desk and celebrating team achievements. There are a number that are directly applicable to the service desk including SDI IT Service and Support Awards<sup>26</sup>, the UCISA Award for Excellence Awards<sup>27</sup> and the ITSMF Professional Service Management Awards<sup>28</sup>. Your university may also have its own internal award ceremonies.

### 4.12.2 Presentations at events and conferences

Opportunities to present at events and conferences, in order to talk about the great work they are doing will help you raise the profile of the service and give people in the team a sense of achievement and pride.

### 4.12.3 Customer feedback

Using customer feedback and customer compliments is a valuable way of acknowledging excellent customer service. Additionally, sharing customer feedback with key stakeholders and senior management is an excellent way of promoting the service and team members and demonstrates where the service desk is adding value.

## 4.12 Staff satisfaction

People who feel valued and appreciated are better able to deliver the excellent customer experience that we are looking for. In order to do this, you must understand your team members. The first recommended action is to request their feedback (for example, by running regular staff satisfaction surveys). Measuring how satisfied team members are with their role helps us to understand their issues and concerns and providing an opportunity to address these early before they start to impact the service and helps ensure the team remains motivated and ready to face any challenges. Regular, light touch staff satisfaction surveys give the team the opportunity to raise issues that they might not feel comfortable doing during other meetings or one to ones.

Surveys are recommended to be anonymous and facilitated by HR rather than the service desk management. This helps ensure that team members feel comfortable about expressing any opinions whether negative or positive. Following the closure of each survey it is important to carry out an analysis of the results and identify any areas of concern or specific issues. Focus groups and workshops can be useful tools for further exploring the issues and identifying appropriate improvement activities. The questions in a staff satisfaction survey may vary each time but areas to cover include:

- understanding of their role;
- understanding of the organisation;
- views and experiences of management;
- views and experiences of personal development opportunities;
- views and experiences of career development opportunities;

<sup>26</sup> <https://www.servicedeskstitute.com/events-networking/awards/>

<sup>27</sup> [www.ucisa.ac.uk/bestpractice/awards/excellence](http://www.ucisa.ac.uk/bestpractice/awards/excellence)

<sup>28</sup> [www.itsmf.co.uk](http://www.itsmf.co.uk)

- views and experiences of reward and recognition;
- feeling valued;
- customer satisfaction.

### 4.13 Health and safety

Everyone has a responsibility to ensure that health and safety guidelines and procedures are followed, and most organisations will have a university health and safety policy. The service desk management will be responsible for ensuring appropriate risk assessments are carried out and that control measures are implemented and effective. They will also need to make sure that all service desk staff receive adequate health and safety training, advice and support and understand how to raise issues and areas of concern. Service desk staff have a responsibility for their own individual health and safety in addition to that of others who may be affected by their work, and should always cooperate on all matters of health and safety ensuring that they follow the correct policies and procedures. Service desk staff will need to undertake all relevant health and safety training and know how to raise and report unsafe and unhealthy working practices and conditions as well as understanding the correct procedures for alarm and evacuations. Individuals on the service desk will need to notify managers if they require a personal evacuation plan or any specialist equipment.

### 4.14 Capability and performance management

Typically, service desk staff are managed in line with their institution's capability and performance management processes, which are specified by the human resources department.

### 4.15 Social responsibility

Increased demands from employees, customers and government bodies for businesses to be more open about their activities means that businesses must now demonstrate that they reach and maintain acceptable standards in their business practice. For employers, social responsibility is now seen as an important way to increase competitive advantage, protecting and raising brand awareness and building trust with customers and employees.

Undertaking social responsibility activities demonstrates that your service desk takes an interest in wider social issues enabling us to embrace university culture and values of community, inclusiveness and professionalism and gives a mechanism for engaging with stakeholders.

Social responsibility activities can include:

- charity work such as sponsored walks, fun runs, bake sales;
- supporting local community and university initiatives, for example: Green Impact initiatives;
- developing relationships with employees and customers through involvement in community activities.

Undertaking charity work as a team helps build bonds, strengthen communication skills and boost morale while making a positive difference in the lives of people who need it most.

**VIEWPOINT**

“With the Gift - PC Service at Leeds Beckett University we donate functioning PC systems to charities and other good causes (approximately 1900 and counting). Currently, a typical machine available via this service is a refurbished Dell desktop with an Intel i3 3.10GHz processor, 4Gb RAM, 250Gb HDD, integrated Intel graphics, integrated soundcard, a built-in 10/100 Ethernet network card and a 19” TFT monitor.

We gift functioning PC systems to members of staff to take home for personal use and staff development (approximately 1400 machines so far, and counting). Currently, the standard specification of PC available for staff gifts is a refurbished Dell desktop with an Intel i3 3.10GHz processor, 4Gb RAM and 250Gb HDD, integrated Intel graphics, integrated soundcard, a built-in 10/100 Ethernet network card and a 19” TFT monitor. A gift PC will be pre-installed with MS Windows 7 Home Basic and anti-virus software.”

**Alex Allen, Service Desk Manager, IT Services, Leeds Beckett University**



## 5 Processes and procedures

Processes and procedures drive everything that the service desk does and their importance should not be underestimated. Processes and procedures provide information and instructions on the services and systems supported by the service desk and staff working on the service desk have a responsibility to feedback on their effectiveness and contribute to process improvement.



*“If you can’t describe what you are doing as a process, then you don’t know what you’re doing”*

D. Edward Deming

Procedures help ensure where possible that actions and tasks are defined and repeatable therefore enabling the service to become more consistent and effective.

Processes and procedures should be tested at regular intervals to ensure that they are working effectively and also to give us an indication as to whether they are being followed correctly – it is worth monitoring usage to ensure compliance and highlight where there may be bottlenecks. Examples of processes include the ITSM processes (outlined below) such as incident, change and request fulfilment, continuity management, quality assurance and knowledge management. Examples of procedures might include call logging, email handling or password resets.

When developing and creating processes it is important to involve the whole team so that everyone is invested and understands why the process works the way it does. Testing ensures that processes are working effectively and is a good way of understanding if processes are being followed correctly. A process should be tested by several people at the point of creation to ensure it makes sense and that it produces the desired results. Once the process is live it is important to monitor usage, this can be done via job shadowing or call coaching/monitoring. Process review dates should be set to review, revise and refresh service desk processes. Version control helps ensure that no one is following an old or outdated process that contains incorrect information.

### 5.1 ITSM processes

The primary processes interfacing with the service desk are outlined below.

### 5.1.1 Incident management

To ensure the highest standard of customer service it is essential that customer contact, incidents and service requests are handled in an appropriate and professional manner. The incident management process manages the incident or service request to ensure that issues are resolved as quickly as possible thus reducing the impact on the availability and quality of the service. An incident is defined in ITIL as an ‘unplanned interruption to an IT service or reduction in the quality of an IT service or a failure of a configuration item (CI) that has not yet impacted an IT service.’

The primary objective of incident management is to restore normal service operation as quickly as possible. Incident management ensures that a standard approach and consistent procedures are used for efficient and prompt response, analysis, documentation, ongoing management and reporting of incidents and to increase visibility and communication of incidents to both business and IT support staff. Effective incident management will enhance the business perception of IT by ensuring there is a professional approach to quickly resolving and communicating incidents when they occur. Incident management will support problem management by providing quality information relating to incidents and raising problem records where incidents require further investigation into the underlying cause. It will also support change management by providing quality information relating to incidents caused by change or which support the need for a change. Incident management is a reactive process where speed and urgency is essential. Incident management is a formal and structured set of activities that should lead to the quickest and least painful resolution. A separate procedure with shorter timescales, increased user communication and greater urgency should be defined for high priority/critical or major incidents.

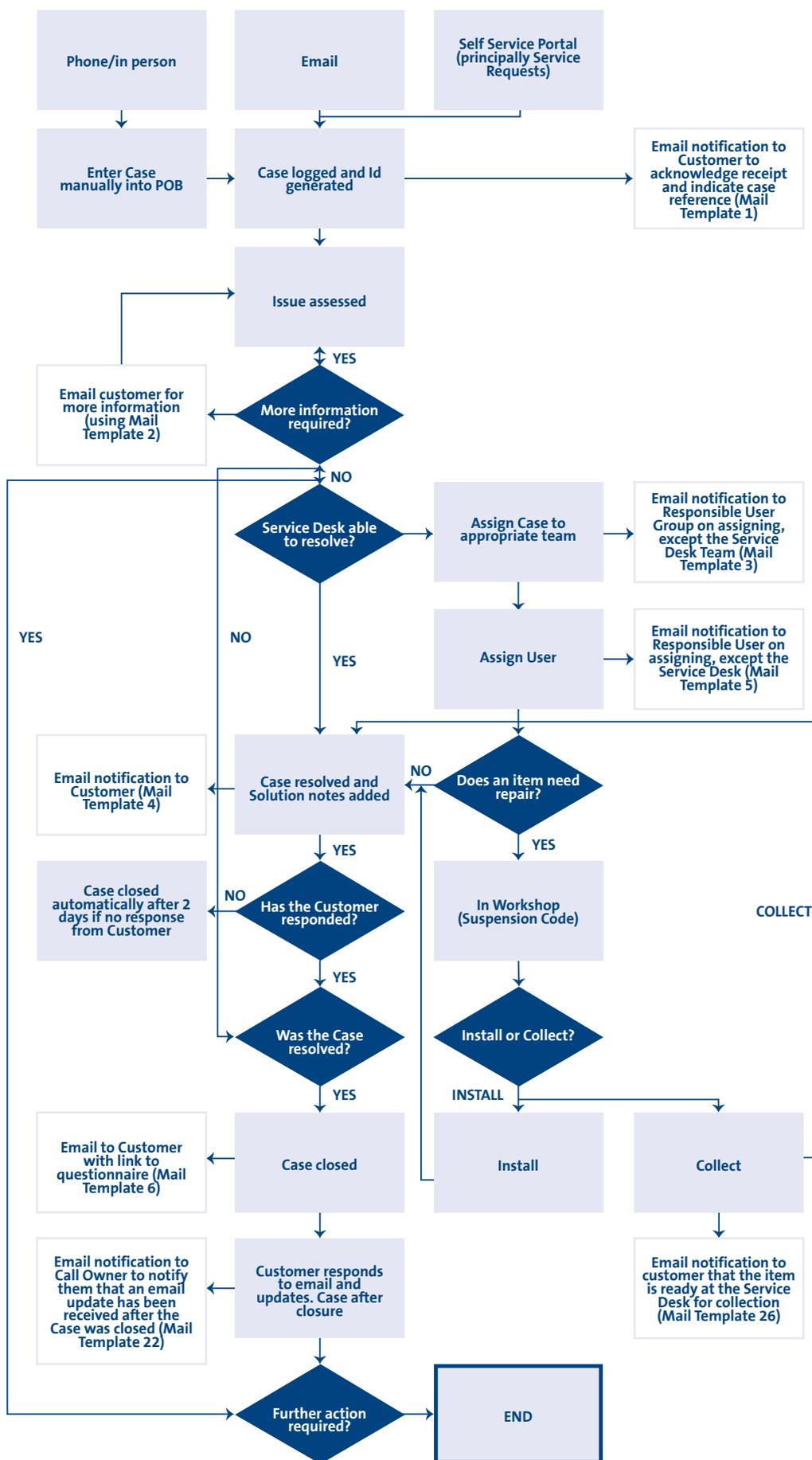


Figure 2: Edge Hill University incident process

## 5.1.2 Request fulfilment

A service request is defined as any request from a user, for information or advice or for a standard change or for access to an IT Service. An example might be to reset a password or to provide standard IT Services for a new user. They do not usually require a 'request for change' to be submitted. Service desks most commonly handle these requests, and increasingly, IT departments are looking to automate or improve efficiency by allowing users to raise commonly requested items within self-service portals. Requests that require more work than can be done at the IT service desk are assigned to the relevant teams detailed above.

## 5.1.3 Change management

The IT change management process is the process responsible for managing all changes throughout their lifecycle. The primary objectives of the process are: to enable beneficial, approved changes to be made within minimum disruption; to control changes to the infrastructure and IT services; to ensure that all changes are tested, planned, scheduled, coordinated and communicated and to minimise business risk.

The service desk should be represented on the organisation's change advisory board (CAB) and be an active contributor to the same. This is to ensure consideration is given to the impact any change may have on services.

A simple but thorough 'request for change' form may be used to record requests (excluding project requests) and subsequently tracking on the ITSM system. It is important to understand the difference between an 'emergency change', 'planned changes' and standard changes. In the case of emergency changes, authorisation may be sought after the change has taken place.

All changes should be reviewed post-implementation. The change will be recorded as a successful completion or an unsuccessful completion. This information will be critical to the service desk. The change process may or may not incorporate the release management process within your organisation.

## 5.1.4 Problem management

The primary objectives of the problem management process are to: minimise the adverse impact of incidents and problems on the business caused by errors within the infrastructure; prevent the recurrence of incidents related to these errors; minimise the impact of incidents that cannot be prevented, and establish the root cause of incidents and then initiate actions to improve or correct the situation.

If a number of similar incidents are identified, then a problem record can be raised in response to this. However, a problem can be identified without an incident existing, for example a warning that logs on a server may be approaching capacity. A problem is the underlying cause which has created, or has the potential to create interruptions to service, the incident(s).

The problem management function is responsible for managing the lifecycle of all problems. The objective is to proactively prevent incidents from happening and to minimise the impact of incidents that cannot be prevented.

## 5.1.5 Service level management

Service level management (SLM) is the process responsible for optimising and providing cost-effective delivery and support of IT services, aligned to business requirements.

The primary objectives of SLM are: to ensure that ITSM processes, Service Level Agreements (SLAs), Operational Level Agreements (OLAs) and underpinning contracts are appropriate for the agreed service level targets; to negotiate SLAs and OLAs; to link with supplier management to ensure that underpinning contracts support the agreed targets we have defined in SLAs; to define, document, agree, monitor, measure, report and review the level of IT service provided and to hold regular customer reviews.

## 5.1.6 Knowledge management

Knowledge management is the process responsible for gathering, storing, analysing and sharing knowledge and information within an organisation.

The purpose of the process is to improve the efficiency of the IT Service by reducing the need to rediscover knowledge. Knowledge is defined as an individual's potential for action and is thus always intrinsically linked to people. Knowledge is vital to the service desk because it underpins everything that we do. The service desk will use knowledge articles to resolve user queries and issues and improve first contact resolution (FCR). The service desk should be responsible for providing feedback on the value of knowledge items (such as a process) and for creating knowledge articles and content for self-help and self-service ensuring that all information is valid, easily accessible, clear and succinct.

The service desk is in a constant state of knowledge flow, both inwards and outwards so it is important to have a structured approach to managing all the information and to find the right platform to present knowledge to your team and to your users.

We need to make sure that any information we present is understandable, concise and appropriate for its intended audience. The service desk can have a major role in turning technical documentation into user friendly content which is accessible when the user needs it and delivered in the form the user wants.

Not all knowledge will belong on all available platforms so it is important to identify what works best for your users and for your team. To help with this it can be useful to create a knowledge management group within the service desk, tasking them with:

- creation of new knowledge articles – both user facing and technical;
- retiring of obsolete knowledge articles;
- updating of content to ensure accuracy / currency;
- regular reviews of knowledge sources to ensure all knowledge is available on all relevant platforms;
- content reviews - can knowledge be presented differently / better?, and;
- communication of knowledge updates.

It is important to identify team members with the correct skills for these tasks. Not everyone has strong written communications, however this should not stop them being involved in your knowledge management group as they could bring other skills such as an eye for organising content clearly or for creating attractive visuals to go with your knowledge content.

Regular reviews of your content are important. Outdated content is frustrating for the users and can reflect badly on the professionalism of your service, so it is worth the effort to approach knowledge management in a structured and considered fashion.



*"If you have knowledge, let others light their candle at it."*

Margaret Fuller



### 5.1.7 Continual service improvement

The service desk needs to keep up with the demands placed on it by ensuring it is constantly reviewing and improving the services it provides. This is done through a process called continual service improvement (CSI). Service improvements can come from lots of different sources and come in many different forms, the trick is to recognise them and make sure that they are collected and recorded.

A CSI register can be a useful mechanism for documenting, collating and tracking initiatives, customer feedback, and projects for service improvement, ranging from the very small i.e. changing the telephone greeting to the very big i.e. a new self-service portal.

Continual service improvement is just as the name says – continual - so we need to make sure we are always ready to collect, log and act on suggestions and ideas for service improvement. By feeding back we are creating a loop as people can see how their previous suggestions have been acted upon and by doing so we are demonstrating that we care and value our customers. We can always improve – and the best way to do this is to listen to the people who use our services every day. We might not be able to achieve everything they ask for but at least they will appreciate us trying and appreciate that we are listening to them.



*“Unless someone like you cares a whole awful lot, nothing is going to get better, it’s not!”*

Dr Suess

## 5.2 Business support processes

A business support process is an activity or set of activities that will accomplish a specific business goal. These are essential to the efficiency of the organisation, and may extend beyond the IT department in terms of scope or activity. It can be useful to provide service desk staff with visual representations of business support processes for example a flow chart which shows the sequence of tasks that need to be followed. These processes represent essential business activities that accomplish business objectives, examples might include creation of a new user account or providing support to classroom learning and teaching.

All business processes should be documented and accessible by service desk staff, typically in some form of electronic storage solution such as SharePoint or a wiki. It may also be useful to provide printed versions of key business processes for use during major service outages, particularly where you may have lost access to online facilities.

## Leeds Beckett University classroom call out

The Leeds Beckett Service Desk is responsible for first line class room IT/AV incidents. These incidents are assigned the highest priority as they impact the primary service of HE establishments and have an high urgency as most lectures only last one hour. We utilise ACD call routing to queue jump these calls so they are dealt with immediately. Our analyst will then follow these steps to resolve an incident.

- **Over the phone direction and remote support of AV systems using Crestron Fusion:** Analysts will ask a series of diagnostic questions and utilise remote technology to resolve incidents at first contact. Some teaching rooms have IP cameras to support in this process. If successful a ticket will be raised and resolved with all the information inputted.
- **Attend the call out in person:** If the analyst is unable to resolve the incident over the phone they will attend the room in question or assign a member of the team at the other campus if the call has come in from there, making sure to inform the second analyst of all the steps previously taken. If the analyst is able to resolve the incident in person a ticket is raised and closed. If the incident is transferred over to a second analyst, the first analyst fills in the ticket with all the information gathered over the phone and assigns it to the second analyst to resolve.
- **Install temporary solution:** If the incident is not resolvable within 10 minutes, for example a piece of equipment has failed, a temporary solution is put in place. This can be moving the class to a nearby vacant room or setting up a temporary projector and laptop. We have 'crash kits' at both campuses ready to be deployed should they be needed. A ticket is then raised with all the information inputted.
- **Escalation to second line:** If the root cause of the incident is not resolvable by the analyst having followed the above steps it is then logged and assigned to second line to follow up with any remedial actions.

We have a service level target to respond to a classroom call out within 10 minutes and to resolve the incident within one hour. In reality the majority of these incidents are resolved within 10 minutes with a high proportion at first contact.

### 5.3 Service desk procedures

Having documented procedures helps to ensure, wherever possible, that all service desk actions are defined and repeatable, therefore maintaining control and ensuring consistency. Clearly defined service desk procedures demonstrate due diligence, and a commitment to driving consistency and efficiency with everyone working in the same way ensuring that customers always receive the same high level of service no matter which member of the team deals with their request.

Having defined service desk procedures which are easily understood and accessible is extremely useful for new starters as their role and the procedures they have to follow are clearly defined and with a structured induction they are up to speed and contributing to the team quickly, additionally they are useful for existing staff and serve as a refresher.

Any documented procedures should be easily accessible and ideally meet all current accessibility guidelines, some form of online storage facility is generally best for this, e.g. shared Wiki, SharePoint, OneNote or intranet site. Whichever method you choose for storage this should be a living document and should be carefully monitored, with version control used to ensure procedures are kept up to date, new procedures are documented and old ones are archived and above all it needs to be easy to navigate and find the required procedure in a timely manner. The storage area should be agreed with any teams outside of the service desk that may use or have input into the procedures to ensure that there is only one single point of truth. Printed copies or a handbook can also be made available and can prove useful in the event of a major service outage but should be periodically checked to ensure it is up to date.

Some key points to consider when documenting your procedures:

- Use flowcharts to illustrate the procedure or supplement written procedures with flowcharts;
- Break large procedures into smaller 'chunks' if needed;

- Consider the use of a checklist to work alongside the procedure (especially useful with new starters so they can be confident they have followed the whole procedure);
- Where possible use graphics and/or icons to make it easy to follow;
- Keep any writing short and snappy to ensure it is read and followed;
- Test your procedure to ensure that it works effectively and can be followed correctly (ideally testing should be carried out by several people to give the greatest chance of identifying errors);
- Once a procedure is live monitor usage to ensure compliance.

Examples of procedures you may wish to document in addition to procedures for resolution of specific types of incidents and service requests:

- call logging – how and what information is required?;
- call escalation and reallocation;
- call escalation and reallocation of uncommon calls;
- opening and closing;
- general service desk housekeeping;
- hazardous waste collections;
- service desk - new team member starter procedure;
- service desk – leavers procedure for team members.

Above all, do remember that processes and procedures provide information and instructions on the systems and services supported by the service desk and therefore service desk staff have a responsibility to feedback on the effectiveness of the procedures and to highlight changes to working practices.

## 5.4 IT Service continuity management and business continuity management

The IT service continuity management (ITSCM) process is responsible for managing risks that could seriously impact IT services. ITSCM forms part of the overarching business continuity planning for the organisation, and ensures that the IT service provider can deliver the required minimum agreed service level by reducing risk to an acceptable level and by planning for the recovery of IT services.

ITSCM must ensure that the service desk can continue to provide services in the event of a crisis. Emergency procedures should be in place in case of any system failures and also in the event of an evacuation of the office spaces. These procedures will need to be reviewed annually and consideration should be given to undertaking a practice evacuation exercise once every few years. The service desk plans should complement those of the department and the university.

Examples include planning in the event of estates damage (including fire, flooding, extreme weather); loss of utility (including power, water) and/or anything which causes an interruption in the service desk provision.

## 5.5 Service transition

Effective service transition ensures that new or enhanced services are successfully introduced into the production environment with minimal disruption and that there is appropriate handover to the service desk to ensure quality business as usual support. The service desk should play a crucial part in the roll out of new or upgraded systems and should be involved in user acceptance testing. Project and other support teams must engage with the service desk to ensure that appropriate support models, training and documentation is in place before a new or changed service is released into the live environment where the expectation is that the service desk will be providing the day to day user support. The service desk should be proactive in their approach to service transition and provide projects and other support teams with templates so that they get the information they need to support the service in the format and structure that works for them.



### VIEWPOINT

“Having the service desk involved in service transition is key to effective service delivery; no other team knows better what the user wants and needs from their IT services. At the University of Edinburgh we aim to have someone from the service desk team as a project member of every IT project in Information Services. We take part in everything from initial requirements gathering and scoping of the service, through testing and User Acceptance Testing. We work with the second and third line teams on the documentation and communications around the service and often also take part in the delivery of training ahead of the final release. As part of the project team we have a say in the sign off of a project into live service and we are able to prevent services or solutions from being launched if they’re not ready for the end user.

Having this role means that the helpdesk have advance warning of new services coming our way. It gives us time to train the team on the support for the new service and they gain a more thorough understanding of new services if they’ve been involved from their infancy. This allows us to meet our goal to act as the users’ partner in Information Services and it all gives a better service to our users, we can support them more efficiently and effectively due to our greater breadth of knowledge of the services we offer.

Another benefit to our project involvement is the fact that it helps us build relationships across the business with other teams in Information Services and beyond. We can learn more about other parts of the business such as application and infrastructure support and in turn, those teams can learn more about the help desk and what it can do for them.

#### **Transitioning our Learn VLE to live service**

An example of service transition where this model has worked efficiently is around the launch of Learn, one of our Virtual Learning Environments for which we are the first line support team.

We had a representative from the service desk on the project from initiation, where they were able to bring the experience we had of supporting and training on the use of WebCT our previous VLE, to influence the requirements gathering.

We worked with the Service Owners to ensure we had the relevant technical support documents and we were able to build on these as the project progressed and we took part in testing and User Acceptance Testing. We contributed to the user facing documentation and we helped disseminate communications around the launch. All service desk staff had full training and were made aware of the new service launch date.”

**Lisa Macdonald, User Support Manager, University of Edinburgh**

## 5.6 Information security and IT governance

In many institutions the IT department is responsible for managing the university's data protection and IT security risks, and most universities have dedicated units or roles which develop, facilitate, implement and enforce IT security processes and procedures. As service desk staff are likely to handle sensitive and confidential data and they should be provided with training and guidance to ensure that this done in line with IT security policies. Service desk should also be trained on how to escalate IT security incidents within their university or college.



*“Because everyone in any organisation needs to create, access and use information, everyone is responsible for protecting it and using it appropriately.”*

UCISA Information Security Management Toolkit<sup>29</sup>

Service Desk managers may find it useful to review the UCISA Information Security Management System Toolkit<sup>30</sup>.

## 5.7 Strategic and business planning

The service desk should contribute to regular strategic planning rounds, detailing contribution it can make to the top level organisational and tactical direction setting for the business. The service desk should also develop and maintain more detailed operational plans in order to ensure the smooth business as usual running of the service, facilitating seamless support to the department and the university. Planning for the service desk incorporates both business and operational plans that establish strategies and tactics (to achieve the missions and goals).

29 UCISA Information Security Management Toolkit (2015) [www.ucisa.ac.uk/ismt](http://www.ucisa.ac.uk/ismt)

30 UCISA Information Security Management Toolkit (2015) [www.ucisa.ac.uk/ismt](http://www.ucisa.ac.uk/ismt)

## 6 Tools and technologies

The service desk will use a variety of different systems, applications and technologies to deliver the service. In order for the team to meet the challenges and demands placed on the service it is essential that they have the right tools to enable them to do their jobs. The systems used by the service desk to deliver services must be fast, effective and easy to use and the team will need to know how to use them and what to do when things go wrong.



*“You cannot mandate productivity, you must provide the tools to let people become their best.”*

Steve Jobs

### 6.1 IT Service management tools

Most university IT departments will have an IT Service Management (ITSM) Tool that is used as single repository for IT support information and customer contact. An effective ITSM tool will provide the service desk with the ability to log, track and report on incidents, service requests, changes and problems. It should help IT understand the level of utilisation, availability and performance of the services we deliver. Effective use of an ITSM tool can save time and resource by automating and streamlining business processes. Other benefits include improved management information through reports and dashboards and improved customer communication via automated notifications and emails. In order to achieve the full benefits of a single ITSM tool it is essential that the system is used consistently by the entire support function.



#### VIEWPOINT

“My personal view of ITSM tools is it is less about the product and more about your relationship with the supplier. There are about 10 main vendors with varying price tags but in terms of functionality they are much of a muchness. I recommend you start by looking at your processes and then use that to build requirements for a tool, don’t let the tail wag the dog.”

**Sally Bogg, Head of End User Services, Leeds Beckett University**

## University of Leeds IT Service Desk ITSM Tool excerpt from handbook

IT at the University of Leeds use ServiceNow as the ITSM tool. The system is used to log all user contact and support queries (incidents, service requests, tickets, complaints etc.) which may be resolved at first contact or referred to other support teams for further action and investigation. Support teams will also receive notification emails for new assignments and the escalation of outstanding issues. ServiceNow is used to assist in managing calls against some predefined targets.

## 6.2 Telephony and unified communications

Unified Communications is an evolving set of technologies that integrates and automates communication across various devices and channels. It refers to the integration of different communication platforms such as instant messaging and chat, presence and availability data, voice and telephony, web and video conferencing and desktop and data sharing.

### 6.2.1 Automated call distribution

A good service desk will use an automated call distribution system (ACD) to manage telephone contact. An ACD system will enable announcements to be made to callers and calls to be queued. When the phone lines are busy callers will be held in a queuing system that provides regular prompts. Some systems will provide a voicemail service for outside of normal opening times or enable users to leave the queue and leave a voice message instead. ACD systems are particularly useful for providing data and reporting which can be used to inform planning for staffing levels and opening times ensuring that customer expectations can be met.

### 6.2.2 Computer telephony integration

The purpose of computer telephony integration (CTI) is to integrate telephony with other technologies, in order to facilitate the efficient processing of customer contacts. Benefits include improved efficiency, the automation of fast responses and resolutions, and rapid and dynamic access to customer details. Common challenges include the potential complexity and cost - and the resultant delay in system response time due to the complexity of the integration.

## 6.3 Remote support tools

The advantage of using remote support tools is that it allows simple tasks to be resolved quickly, without the need for a technician to visit a computer in person. There are many different products available including TeamViewer<sup>31</sup>, Bomgar<sup>32</sup>, LogMeIn<sup>33</sup>. Ideally these should be integrated with the ITSM tool.

## 6.4 Knowledge management tools

It's vital that all knowledge sources are comprehensive, accurate and consistent, however this can sometimes be difficult with so many channels and platforms. Each organisation will have a suite of knowledge platforms including:

- website;
- self service portal;
- a wiki or SharePoint technical knowledge base;
- known error database.

31 [www.teamviewer.com/en/](http://www.teamviewer.com/en/)

32 [www.bomgar.com](http://www.bomgar.com)

33 [www.logmeininc.com/](http://www.logmeininc.com/)



## VIEWPOINT

“We’ve set up a knowledge management group called K-Flow (Knowledge Flow). The group meets monthly and is headed up by the first line supervisor. Each group member is responsible for one of our knowledge platforms – the website, technical wiki, Self Service Portal knowledgebase and out of hours support knowledge articles. The group meets to review each area of content, discussing cosmetic look and feel along with reviewing any new articles and discussing the promotion of new content.

Our most recent exercise was a review and revision of the structure of our help pages on the website. We arranged to have some students filmed as they navigated our website performing various tasks to find information relating to IT support. We were able to capture their feedback but also to gain an insight into how they approach searching the site and how they physically navigate through pages. We used all of this information to restructure our web pages and make the knowledge easier to find, clearer to read and more appealing. Our aim is to expand this exercise and work with other teams to enhance all Information Services web pages at the University of Edinburgh.”

**Lisa McDonald, User Support Manager, University of Edinburgh**

## 6.5 Event management and alert services

Placing the service desk at the heart of your service continuity process is key to minimising disruption from both planned and unplanned service events.

In addition, an effective alert service is critical for business continuity and ensures that any disruption to service is acknowledged, understood and resolved as quickly as possible.

The service desk has a significant role in effective alerting for both planned and unplanned events as they are often the first people to spot an emerging issue and the potential impact for the business. They are also very aware of key points in the academic or business year which can inform the timing of scheduled maintenance.

It is important to find the right alert service and monitoring tools for your organisation, be it a website which displays information pulled from background monitoring systems, to a display screen showing active service information. You may also wish to consider the use of email and social media to alert users to maintenance and service events or a combination of the two – using a Twitter API to feed through to your support pages is a common practice and can be useful to display information quickly and concisely.

Empowering the service desk to be the lead on alerting and communications around maintenance and unplanned service events should add value to the service received by your users. The service desk can ensure alerts are communicated in a clear and timely fashion and that they are directed at the correct audience. The service desk is rarely the team responsible for fixing an issue, so it makes sense for them to communicate to the business, allowing the second and third line teams to get on with resolving the issue or performing the maintenance task.



## 7 Performance metrics

Performance measures are a good way of demonstrating the strategic value the service desk brings to the department and to the university. However in a data rich environment it is very easy to become overwhelmed with measurements and metrics. It is important to ensure that we are measuring the right things – the things that matter to us and to our customers and users. When developing critical success factors (CSFs) and key performance indicators (KPIs) it can be useful to take a top down approach and develop a metrics map; start with your vision and mission and develop CSFs and KPIs that demonstrate how you are going to achieve your goals and objectives. By using a top down approach you will ensure that you are focusing your performance in direct relation to your vision and mission. As your service desk mission and vision should directly support the departmental and university strategic aims and objectives, it should enable you to easily demonstrate how you are adding value to our organisation.



### 7.1 Critical success factors (CSFs) and key performance indicators (KPIs)

In order to measure the service desk's critical success factors (CSFs) and key performance indicators (KPIs) you will need to produce a number of internal reports. Data analysis should be undertaken on a regular basis to demonstrate how you are improving over time and to help understand trends and issues. Data will be gathered from a variety of sources including the ITSM tool, customer satisfaction surveys, staff satisfaction surveys, ACD telephony system and HR systems. The service desk should collect data that compares actual results against targets and CSFs and KPIs should be regularly reviewed to ensure that they remain appropriate.

A good objectives document will show a service desk's vision, mission, critical success factors, goals and KPIs on one sheet to illustrate how the overall success of a service is dependent on measuring metrics which help the university meet their goals and focus on what we want to achieve.

## 7.2 Standard metrics

It is important that the service desk collects data and compare them to actual results against targets as this will allow you to understand performance against goals and to enable you to make informed decisions about service improvements or resourcing requirements. Standard service desk metrics include:

### 7.2.1 Number of incidents, number of requests

The number of incidents and service requests that have been logged. This is a very simple measure of contact volumes. Ideally it should be categorised by channel i.e. email, phone, walk in, event or other. This data should be trended monthly and annually (or more frequently if required). Measuring volumes enables the service desk to see peaks and troughs in the service, understand the impact of service issues and provide management information for informed resource planning and financial forecasting. This is a useful metric for understanding your service desk throughput.

### 7.2.2 First level fix (FLF)

The percentage of incidents that are resolved by the service desk (or first level support). This may not necessarily be a fix at the first point of contact but the fix is delivered by staff working on the service desk or in your front line support function. The service desk should collect data on the number of contacts that are resolved by first level support. This data is typically taken from the ITSM tool. Dealing with an incident or service request at first level support is often the quickest and cheapest. This is a useful metric for understanding the effectiveness of your service desk.

### 7.2.3 First contact resolution (FCR)

The percentage of incidents and service requests that are resolved by the service desk at the first point of contact (typically via phone or remote support) without delay. FCR is a resolution that is enacted during initial contact with the customer. From the perspective of the user, dealing with an issue at first contact is highly beneficial as it means less disruption to the working day and means a quick resolution. It is different to first level fix which concerns incidents and service requests that may be resolved by the service desk (or first level support) without being escalated to second line support teams. This is a useful metric for understanding the effectiveness of your service desk.

### 7.2.4 Average and longest time to respond by contact method

This is a measure of how long it takes the service desk to respond to incidents and requests via contact type. This data is typically taken from the ITSM tool. This is an important metric because it enables you to understand where there may be bottlenecks and can be used to inform resource planning. This is an effective metric for understanding the responsiveness of your service desk.

### 7.2.5 Average time to answer and longest time to answer

This is a measure of how long it takes the service desk to respond to phone calls. The data is typically taken from the service desk automated call distribution system (ACD) system. The longest time to respond is also measured. This is an important metric because if a customer is waiting too long for their phone call to be answered it will likely lead to dissatisfaction. This is an effective metric for understanding the responsiveness of your service desk.

### 7.2.6 Abandonment rate

This is a measure of how many telephone calls are terminated prior to contact with the service desk. The data is typically taken from the ACD system and is measured as a percentage of total calls taken, number of calls abandoned and average and longest time to abandonment. This metric is important because it demonstrates the availability of the service and our ability to respond to user queries and can be directly linked to user dissatisfaction/satisfaction.

### 7.2.7 Reopened incident rate

The service desk collects data on the percentage of incidents and service requests that are re-opened for additional action or follow up. This data is typically taken from the ITSM tool. It demonstrates how many incidents and service requests have been incorrectly closed without a satisfactory resolution for the user. This measurement is important because it identifies where training may be required as the incident or service request was not completed in a satisfactory manner. It can also be used to review the incident closure process and check its effectiveness.

### 7.2.8 Backlog management (aged calls)

The number of open incidents and service requests at the end of each reporting period (monthly, or more frequently if needed). The service desk collects data on the total number of incidents and service requests that are open compared to their age. This data is typically taken from the ITSM tool. This measurement is useful because it can be used to identify if there is a lack of resource or a bottle neck. The backlog data is trended against each month and the information is passed to the service owners and team managers. This is an effective metric for understanding overall performance against targets for the department and can be directly linked to customer satisfaction/dissatisfaction.

### 7.2.9 Customer satisfaction

Customer satisfaction surveys should be sent out using a variety of mechanisms (closure and resolution emails, social media etc.) and the data should be trended and monitored to highlight where there are issues or to demonstrate improvement over time. The data is collated from a variety of sources and is the most important metric for the service desk as it provides an indication of overall customer satisfaction.

### 7.2.10 Staff satisfaction

Staff satisfaction surveys (separate to those undertaken by the wider department and university) should be undertaken regularly and the data should be trended and monitored over time to highlight where there are issues or improvement. The data may be collected via an online survey or through face to face meetings. Staff satisfaction is essential in understanding the culture of your service desk and may provide useful insight into staff happiness and job satisfaction.

### 7.2.11 Remote control and self-help monitoring

The service desk should routinely collect data about the frequency that self-help and remote support successfully resolves a user's incident or request. By recording the volume and the percentage of incidents and requests that are resolved via self-help and remote support the service desk can understand the investment and effectiveness of both knowledge management and the remote support tools. The data is typically taken from the ITSM Tool.

### 7.2.12 Staff retention and attrition

The service desk should collect data about the number of staff leaving the service desk as a high turnover could be an indication of dissatisfaction within the team. It is important when measuring retention to record the reasons for leaving such as retirement, promotion to other roles within the department or university or to take up another role outside of the university. High staff turnover can be costly and can impact the quality of service you are delivering.

## Staff retention

The success of a service and support operation is linked to its ability to retain talented and experienced service management professionals. To this end, understanding the average time a service desk analyst remains in their role can be of significant value when gauging both the capability of the organisation to deliver exceptional support and the success of the leadership team in developing and retaining an experienced team. It is encouraging to see that the higher education service management sector has developed an approach that ensures quality service desk professionals are retained. However, it is possible that the higher rates of retention signify a potential lack of progression and career development in the industry. The majority of HE organisations can keep analysts for between three and five years. This important level of retention can be placed in a broader perspective when compared to the wider industry, in which 50% of service desks can only retain staff for up to three years. Indeed, 2% struggle to maintain their employees for longer than six months. Service desk leaders need a balanced approach to staff retention. Whilst keeping talented service desk staff is of course positive, it is equally important to ensure progression opportunities are available to provide adequate turnover and introduce new skills and experience into the team.

**Extract from the SDI UCISA UK Higher Education Service Desk Benchmarking Report<sup>34</sup>**

| Higher Education | 2016 | Wider Industry     | 2016          |
|------------------|------|--------------------|---------------|
| Less than 1 year | 3%   | Less than 6 months | 2%            |
| 1 – 3 years      | 29%  | 6 – 12 months      | 6 – 12 months |
| 3 – 5 years      | 34%  | 1 – 2 years        | 18%           |
| 5 – 10 years     | 21%  | 2 – 3 years        | 25%           |
| Over 10 years    | 12%  | Over 3 years       | 50%           |

Table 2: Average time in role of service desk analysts in HE Sector compared to wider service desk industry<sup>35</sup>

<sup>34</sup> SDI UCISA UK Higher Education Service Desk Benchmarking Report [www.ucisa.ac.uk/publications/beckmark\\_sdi](http://www.ucisa.ac.uk/publications/beckmark_sdi)

<sup>35</sup> SDI UCISA UK Higher Education Service Desk Benchmarking Report [www.ucisa.ac.uk/publications/beckmark\\_sdi](http://www.ucisa.ac.uk/publications/beckmark_sdi)

## 8 Customer engagement

Customer engagement is at the heart of a successful service desk operation. You need to manage people's expectations and respond positively to feedback.

### 8.1 Customer service standards

A customer service standard, charter or statement is a written policy that communicates your organisation's commitment to providing services and minimum levels of service. They are used to set out the standards that our customers (staff, students and visitors) can expect to receive from the services we deliver and they are an excellent way of communicating all aspects of what customer service means and looks like. Many universities have an organisational customer service standard but if not you may want to consider creating your own service desk customer service charter. Your customer service charter should define the full range of services on offer and how you will respond to each type of interaction, for example phone, email, face to face, social media. The charter should spell out your commitments clearly in non-technical language and may include information on how you will respond and resolve complaints and suggestions. You should also consider how your charter will be shared with your customers, this is typically via a website but it may include printed handouts or posters - particularly if you have a physical service desk that provides a walk in service. Finally you will need to provide your service desk with appropriate training to ensure that the charter is followed at all times.



## 8.2 Customer satisfaction

Customer satisfaction is one of the most important mechanisms for understanding if we are meeting customer expectation and whether we are delivering the standard of service that is required. Having customer feedback mechanisms in place will allow the service desk to understand more about our customers and enable us to see how the service is changing and improving over time. Customer satisfaction should also be the key driver for continual service improvement.



*“Your most unhappy customers are your greatest source of learning.”*

Bill Gates

Customers want to be heard and to know they have been listened to, so it can be useful to set up regular reviews of all incoming feedback and ensure that all feedback (be it negative or positive) is acknowledged and that any associated actions or improvements are documented. Creating a continual service improvement register is an ideal way to keep track of feedback and actions. It is also important to demonstrate to the customer that their feedback has been used to improve the service, either by communicating with them directly or by using advertising campaigns such as “You said, we did.”

Share feedback with your service desk staff and with other teams too – this helps remind everyone that customers are at the heart of our services and sharing positive feedback can be a particularly strong tool to increase morale and pride.

It is also recommended that service desks use feedback as a tool to influence service improvements. Anecdotal evidence from customers can be a very effective way to demonstrate potential service improvements to second line teams.

Whilst customer satisfaction surveys have lots of benefits, they should not be the only mechanism for capturing and measuring customer feedback. Surveys can contain bias and may not always provide a good means of allowing users to express their true feelings. Feedback ideas include:

- event and periodic surveys;
- survey kiosks;
- complaints and compliment processes;
- focus groups;
- suggestion boxes, and;
- information from incident and service requests in your ITSM tool.



### VIEWPOINT

“Each week, performance feedback responses are gathered from a wide range of users and University of Edinburgh customers and collated into sets of annual results. This survey goes to a randomly selected 10% sample of people where their queries to the IT and Library Service Desks have been closed in the last week. These responses are extremely useful as they inform how we can develop and improve the quality of service we provide.”

[www.ed.ac.uk/information-services/help-consultancy/satisfaction-survey](http://www.ed.ac.uk/information-services/help-consultancy/satisfaction-survey)

**Lisa McDonald, User Support Manager, University of Edinburgh**

### 8.3 “You said, we did...”

Promoting improvements that have been made by the IT department based on customer feedback using a “You said, we did...” campaign is a great way of engaging with customers and letting them know that you listen and act upon feedback whenever possible.

Ways of promoting service improvements that have been made based on feedback can include:

- updating a dedicated webpage on your IT website;
- poster campaigns;
- display boards, and;
- inclusion in monthly IT updates.

“You said, we did...” campaigns are also an excellent way of demonstrating to the business the value that you provide and that you are engaging with customers on a regular basis. Lancaster University is just one university who does this<sup>36 37</sup>; the University of Leeds is another<sup>38</sup>.

### 8.4 Business relationship management

Business relationship management (BRM) can help the service desk to maintain a positive relationship with customers and users by ensuring we are providing and developing our services in line with business and organisational need. This is essential to the service desk as we are the direct point of contact between the user and IT. A good or bad experience at the service desk is likely to positively or negatively influence the relationships between our users and IT. Examples of how the service desk can contribute to BRM include:

- service desk representation on all major university project boards;
- service desk representation on all key university events;
- service desk responsible for signing off on all user business as usual communications as well as communications for events and projects;
- service desk responsible for feeding into lessons learned for all key university and IT projects;
- service desk responsible for maintaining ongoing relationships with schools, faculties and other services;
- providing a point of contact for all senior business users who have complaints or comments about the services;
- service desk facilitate focus groups to gain feedback on specific projects or events.

<sup>36</sup> [www.lancaster.ac.uk/iss/news/2017/making-it-better/](http://www.lancaster.ac.uk/iss/news/2017/making-it-better/)

<sup>37</sup> [www.lancaster.ac.uk/iss/news/2016/improve-it/](http://www.lancaster.ac.uk/iss/news/2016/improve-it/)

<sup>38</sup> [https://it.leeds.ac.uk/info/218/it\\_help\\_desk/706/you\\_said\\_we\\_did](https://it.leeds.ac.uk/info/218/it_help_desk/706/you_said_we_did)



## 9 Quality assurance

Quality assurance is essential for ensuring your service desk is fit for purpose and is adding value to both the department and to the university. It can be helpful in identifying areas for improvement. Quality assurance should consist of a number of different processes and measurements which will help provide a comprehensive understanding of the service that is being delivered.

### 9.1 Benchmarking and best practices

#### 9.1.1 Service Desk Certification

SDI Service Desk Certification<sup>39</sup> can provide a useful framework for continual service improvement as it provides a mechanism for measuring and improving the effectiveness and quality of the services we are offering. Service desk certification enables you to formally assess your capability against the Service Desk standard<sup>40</sup>, and will help identify areas for improvement.

The globally recognised SDI Service Desk standard is designed to look closely at all aspects of the service desk operation including management, customer service, resources, tools, training, strategy and continual service improvement. The standard provides a clear and measurable set of benchmarks for your service desk operation, and also forms the basis of the Service Desk Certification maturity rating model, providing you with an in-depth and unbiased view of your services.

#### 9.1.2 Customer Service Excellence

Customer Service Excellence<sup>41</sup> (previously the Charter Mark) is an accreditation for organisations that demonstrates an independent achievement of Customer Service. The Customer Service Excellence Standard is made up of five criteria with 57 elements in total. Assessment is carried out via a desktop review by an authorised assessor. As well as viewing physical documentation, and carrying out observations, the assessor speaks to customers, staff and partners to review the company's attitudes and working practices along with details of their customer focussed initiatives and performance.

39 [www.servicedeskintstitute.com/service-desk-benchmarking/service-desk-certification/](http://www.servicedeskintstitute.com/service-desk-benchmarking/service-desk-certification/)

40 [www.servicedeskintstitute.com/service-desk-benchmarking/service-desk-standard/](http://www.servicedeskintstitute.com/service-desk-benchmarking/service-desk-standard/)

41 [www.customerserviceexcellence.uk.com/](http://www.customerserviceexcellence.uk.com/)

### 9.1.3 ITIL

ITIL is a set of best-practice publications for IT service management. Owned by the Cabinet Office (part of HM Government), ITIL gives guidance on the provision of quality IT services and the processes, functions and other capabilities needed to support them. The ITIL framework is based on a service lifecycle and consists of five lifecycle stages (service strategy, service design, service transition, service operation and continual service improvement), each of which has its own supporting publication<sup>42</sup>.

### 9.1.4 ISO20000

ISO20000<sup>43</sup> is an international standard for IT Service management. It reflects best practice guidance contained within the ITIL framework and can be used to assess an organisation's approach to implementing, operating, monitoring and reviewing service management systems.

## 9.2 Call coaching and interaction monitoring

In order to ensure the highest standard of customer service it is essential that we handle and manage support interactions in an appropriate and professional manner. Professional contact handling ensures that we delivering an effective and efficient service. It also improves our reputation and credibility and will increase users confidence in the services we provide. Call coaching is a tool to assist in improving service quality and monitoring contact handling. It can be used to give an insight into direct interactions between customers and service desk staff.

Professional call management requires us to:

- listen to and understand the user's description of the incident or service request;
- use effective communication skills to probe for clarification;
- address the emotional needs of the user (i.e. be empathetic);
- focus on the actions needed to a resolution;
- Use silent time effectively;
- set the expectation for customers.

Call coaching allows service desk management to understand the quality of the service desk analysts' communication skills as well as the quality of the processes and procedures. When measuring quality it is necessary to look at the following components; phone calls and incoming tickets/emails, incident and request logs.

Call quality monitoring allows IT service desk management to measure:

- use of appropriate language (written and verbal);
- consistency and facts;
- adherence to process and procedure;
- empathy and rapport;
- politeness, friendliness and courtesy;
- flexibility;
- efficiency;
- calmness under pressure and;
- attention to detail.

<sup>42</sup> [www.axelos.com/Corporate/media/Files/Glossaries/ITIL\\_2011\\_Glossary\\_GB-v1-0.pdf](http://www.axelos.com/Corporate/media/Files/Glossaries/ITIL_2011_Glossary_GB-v1-0.pdf)

<sup>43</sup> [www.iso.org/standard/51986.html](http://www.iso.org/standard/51986.html)

In order to handle customer contact in a professional manner, service desk analysts must listen to and understand the user's description of the incident or service request, use effective communication skills to probe for clarification and focus on the actions needed to resolve the incident or service request. This will involve:

- identifying the user correctly;
- verifying the user is eligible for support;
- identifying the priority of the incident or service request;
- documenting the incident or service request;
- identifying and documenting any specific user requirements (e.g. availability for call back);
- classifying and categorising the call;
- setting user expectations;
- resolving the incident or service request, and;
- escalating to second line teams or third party suppliers where appropriate.

Reviewing service desk interactions with customers will improve customer service and provide a mechanism for continual service improvement. Call coaching can also be used to develop knowledge articles by identifying where there are gaps in support and process information.

Call coaching gives the ability to review and develop individual skills ensuring that the service desk analysts are performing at optimum levels and are continually updating and developing. It is a flexible and positive way of giving staff feedback on the work that they do but sessions must be held regularly and consistently if it is to add value.



## VIEWPOINT

“We implemented a new telephony system in 2016 which allowed us a new set of monitoring features including a call coaching (listening) feature which means we could start assessing the quality of our telephone service and support staff handling difficult callers.

To develop the call quality monitoring system the first line supervisor worked with one of our first line analysts to develop a scorecard with the aim to ensure that we were consistent in our monitoring of call quality and that we measured performance against relevant skills.

The supervisor and analyst used the score card, then sat down together to review the results. This allowed us to identify the sorts of calls that would require a different set of call checks, such as calls where a user was chasing up an existing issue.

To monitor performance a team supervisor listens to the analyst on the telephone, hearing both the customer and the agent.

Agents are marked on welcome and introduction; information gathering; solving the problem / providing information and call wrap up and ending the call

Staff are also marked on their interpersonal skills, their attention to detail and their use of the call management system.

It's important that the supervisor has good listening skills and that you choose enough calls to give a good selection of scenarios for the staff member to demonstrate their skills on.

The call quality score cards are used for induction and are incorporated into regular 1:1s for review.”

**Lisa McDonald, User Support Manager, University of Edinburgh**

### 9.3 Service review

In order to improve your service you need to ensure you review it regularly. Not just within your own team, but with all areas of your business from customers through to senior management. Regular service review meetings allow you to keep focussed on the current state of your service and to see what you might want to work on next to improve it.



## VIEWPOINT

“We regularly meet with different parts of the business to review service. This starts with regular team service improvement meetings where we review service improvements, customer feedback and service performance. The outcomes of these meetings are then carried through to regular liaison meetings with other second and third line teams and with the schools and departments we support along with senior management meetings to discuss the performance of the wider Information Service.”

**Lisa McDonald, User Support Manager, University of Edinburgh**



## VIEWPOINT

“A monthly service review can be valuable for the Service Desk and wider IT department to keep aware of how well it performed that month and some information can also be used to present to customers. The type of information we review monthly includes:

- all the high priority calls raised that month, the impact each had and whether caused by a change or infrastructure and should a problem record be raised;
- service availability as a rolling 6 month view with services showing as green, amber or red;
- telephone statistics, including call volume, average hold time, maximum hold time, abandon rate;
- total calls logged in a month broken down by phone call, email, visitor or other;
- percentage of calls closed or resolved first line;
- type of customer i.e. staff, student, external;
- percentage of calls logged as incident, request, advice, and;
- complaint calls which are not yet resolved.”

**Kath Murray, Helpdesk and ITAV Team Lead, Robert Gordon University**

## 9.4 Continual service improvement

As previously indicated in Section 5, Processes and procedures, the service desk needs to keep up with the demands placed on it by ensuring it is constantly reviewing and improving the services it is providing through continual service improvement (CSI).

## 9.5 Horizon scanning

In order to deliver the highest quality of services it is important that the service desk keeps abreast of the latest industry and technological innovations and new working practices. Using industry best practice is a great way of improving the services we provide and helps us keep up with the rate of change within both the HE and IT sectors. Good sources of best practice include conferences, events and white papers.

The UK HE Service Desk Benchmarking Report provides an overview of the trends in service desk industry<sup>44</sup>.



## VIEWPOINT

“The IT Service Desk at the University of Leeds staff attend a range of events and conferences to enable them to horizon scan and find out about hot topics impacting the sector. Following attendance at events, individuals will report back on their findings and key takeaways. This will be done through reports, presentations and action plans.”

**Tim Walker, IT Service Desk Manager, University of Leeds**

<sup>44</sup> SDI, UCISA and TopDesk (2016) UK Higher Education Service Desk Benchmarking Report 2016 [www.ucisa.ac.uk/publications/beckmark\\_sdi](http://www.ucisa.ac.uk/publications/beckmark_sdi)



# 10 Communication and marketing

For most users the service desk will be the only interaction that they have with IT and therefore it is important that the service desk staff have excellent customer service and communication skills. Good communication with users is fundamental but just as important is the communication between the service desk team, and other support teams including second and third line. Service desk management have a vital role to play in this process as they provide the link between the service desk and the rest of the department and university and they are responsible for fostering strong relationships that should be built on clear and open communications. The service desk manager should ensure that the goals and objectives of the service are communicated and aligned with the departmental and university strategic objectives. They should also demonstrate confidence in the team, demonstrating how progress is being monitored, benchmarked and improved over time.

## 10.1 Promotion and marketing

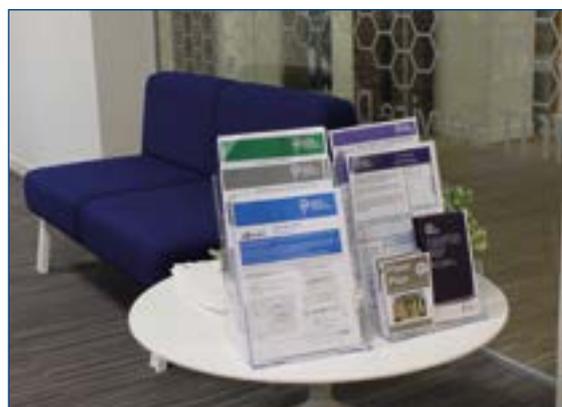
There are many benefits to be gained by ensuring we promote and market the service desk; it will educate our users about the value and benefit of using the service desk, making users aware of what services are available to them and improving user satisfaction and loyalty.

It is also important that we advertise new services and service improvements. Promotion and marketing can also help manage user expectations, which is very important. If users are aware of what services the service desk offers and what levels of service they can expect then they will be better prepared for the interactions that will come, hopefully preventing users placing unfair demands on the service. It is important to determine which channels will be used for promotion and this will depend on the objectives and the budget. Consideration should be given to the use of; fliers, hand outs and brochures, e.g. your IT brochures, articles in bulletins and newsletters, posters and banners, system announcements e.g. VLE, social media, promotional items such as pens, USB drives and tote bags and information in the service catalogue and departmental website.



*“As long as you can have a personality you don’t need a brand.”*

Martina Holubcova



Copyright © Leeds Beckett University

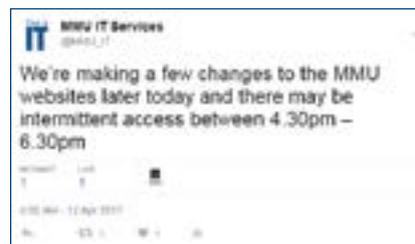
Photo 4: Display of leaflets

## 10.2 Social media

Social media is a great way for service desks to keep in touch with their customers and users and it really suits the demographics of the university community. It is important to remember that social networking sites such as Twitter and Facebook are viewed by many as a two way mechanism and you need to be prepared to answer queries and respond to feedback as well as using it to give out service updates.

Twitter is an excellent way of marketing and promoting the service desk, it can be used to give users hints and tips, inform people about opening times and service availability and communicate changes and service outages. It can be useful to document a communication roadmap to help plan Tweets in advance. Consideration will need to be given to resourcing an additional communication channel as you should also enable customers to use Twitter as another contact method for reporting service issues and giving feedback.

UCISA's Social Media Toolkit contains guidance on professional use of social media<sup>45</sup>.



### VIEWPOINT

“The Edinburgh Napier IS Service Desk (or @EdNapITSupport) uses Twitter to inform users of our products, promote our services and provide a channel for communicating service disruptions. It raises the profile of the IS service desk and is a core component of how we communicate with customers and assists in personalising the student experience. We are motivated to give customers the ability to pick up knowledge and resources with consistent and clear messaging. This messaging supports our goal of consistently educating our customers and supplying reliable advice.

The service desk has a Twitter handbook that helps us ensure a consistent approach to Twitter no matter who is involved with Tweeting or their experience. This is covered with our staff at the service desk during their induction period. The handbook contains:

- A “Tweet Bank” – This has a list of tweets which can be used or reused for idle periods for example when someone is not sure on what to tweet they can just head to the tweet bank and pick one out. This also includes pre made tweets for emergency situations such as when there is a major loss of service or a core service is impacted. For example there is text ready to copy over with simple messages: ‘Very sorry about this. Please give us a call at 0131 455 3000 and we’ll assist.’
- Guidance on team policy – We’ve adapted our current practices to allow a “Ten Steps” to Twitter success which includes tips such as “Don’t be afraid to show a little personality in your tweets. As long as you keep it professional, there’s nothing wrong with being chatty.”
- We actively collaborate with our part-time staff who work as student helpers in our customer-facing helpdesks. They are key in creating new ideas on what we should be tweeting such as services where student awareness is low.”

**Lisa Macdonald, User Support Manager, University of Edinburgh**

<sup>45</sup> UCISA Social Media Toolkit (2014) [www.ucisa.ac.uk/socialmedia](http://www.ucisa.ac.uk/socialmedia)

### 10.3 Meetings

Meetings are a useful way of communicating and coordinating action but in order to be successful they should have a definite purpose. Some examples might include to deal with conflict or issues, improve communication, give an overview of new services or service enhancements or to provide personal development and mentoring and the service desk should facilitate and participate in lots of different meetings.

It is very important that the service desk be given the opportunity to have regular team meetings, this may require other support teams to cover the desk. Regular team meetings will ensure that staff knowledge and practice is kept up to date in what is typically a fast changing environment. They provide a forum for sharing ideas and are useful in building relationships with the service desk team.



#### VIEWPOINT

“Here at Robert Gordon University I have a helpdesk team meeting every Wednesday afternoon. It’s the same day and time each week so we can advertise that we’re on a reduced service to customers. We use the hour to discuss any CAB approved items and, project updates. We sometimes use the time for training, and consider any issues the team wish to raise.”

**Kath Murray, Helpdesk and ITAV Team Lead, Robert Gordon University**

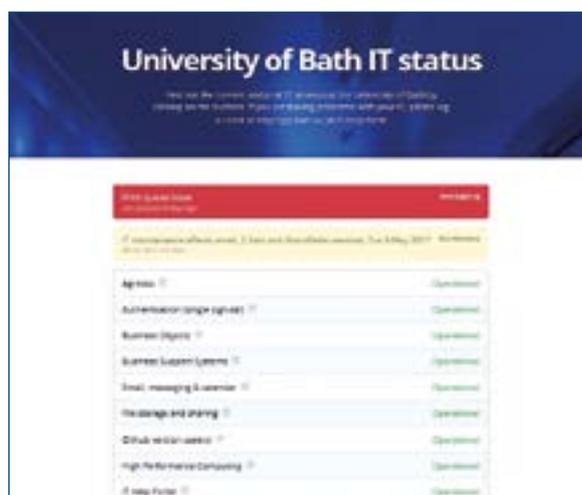
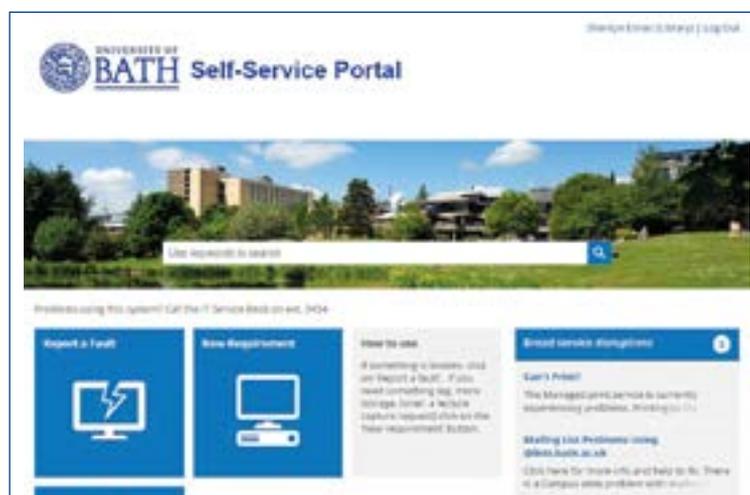
### 10.4 Service status page

A service status page is a simple web page that is used to communicate service issues and unavailability. Ideally this should be managed by the service desk who will be responsible for keeping it updated with relevant and timely information. The best service status pages use a traffic light system to communicate service issues.



### 10.5 User-facing communications

The service desk should have a number of different mechanisms for communicating service issues, planned work and maintenance and promotional and marketing information to users. Typical examples include mailing lists, news items on websites and system notifications (i.e. from the ITSM Tool) and desktop/screen saver adverts. All user-facing communications should be succinct, well structured, grammatically correct and written in non-technical language that is jargon and acronym free.





# 11 Summary

In recent years university service desks have been forced to accept that the break/fix support model of the 1980s is no longer their primary purpose. The service desk of today must support a broader array of technologies and services, manage third party relationships with cloud and outsourcing providers and deliver useful services.

Universities are finally understanding that the service desk is a critical component when it comes to delivering student experience. The service desk is now widely accepted to be the primary customer interface, and is where people get to see the value of the services we are offering, if we do not provide effective front line support then it does not matter how good the actual service is – from a user perspective it will be rubbish! The service desk should be the flagship of every IT support function and be the heartbeat of your department.

## 11.1 Mission and vision

Vision statements are used to define organisational purpose and communicate values. Creating a strong vision and mission statement for the service desk that support the overall University and departmental strategy can ensure that teams have a strong sense of direction and purpose and keep our customers at the heart of the services we offer. Evidence has shown that they are an excellent way of inspiring our front line staff, helping them to understand the objectives of the service, department and University and the role that they play in it.

## 11.2 Service desk structure and resources

It is worth noting that in recent years some university service desks have seen their staffing levels reduced, however there has been an increase in the number of customer facing roles, demonstrating the shift away from traditional catch and dispatch help desks of the past to a more professional customer focused service.

## 11.3 People

One of the best ways to improve student experience is to improve employee experience and we need to ensure we understand the value and importance of the people that are responsible for service delivery.

The service desk analyst of today requires that magical combination of problem solving and analytical thinking, good business awareness and excellent communication and customer service skills and we must ensure that job descriptions and salaries support this requirement if we are to attract the right calibre for these critical front line roles.

We will need to maintain a balanced approach to staff retention, attracting and retaining talented staff is essential for delivering high quality customer focused services but we must ensure that we are supporting progression and providing development opportunities to prevent our service desk teams from growing stale and stagnating. Using student placements within the service desk is an excellent way of bringing in new staff and introducing fresh ideas and working practices.

## 11.4 Processes and procedures

The future of IT Service management within the higher education sector will see universities using ITIL processes much more selectively and in a much more balanced way, this will help ensure that appropriate effort is not invested in out of the box processes that do not support business outcomes and do not offer significant business benefits.

The service desks of the future should also be looking to streamline and automate processes wherever possible, increasing efficiency and enabling us to focus resourcing on value added activities.

## 11.5 Tools and technologies

Service desks will continue to exploit a wide range of tools and technologies to enable them to provide services to customers both on and off campus and the use of remote support has seen a significant rise in use across the sector since 2014. However, the adoption of strong self service capabilities has been poor and is currently only being provided by 9% of our university service desks. The sector has also reported that it is struggling with outdated and ineffective ITSM products.

Our service desks will need to get much better at adopting new technologies in order to meet the increasing demands that are being placed on us. An effective ITSM tool including self service capabilities will provide a single repository for support information and customer contact, enabling us to track, report and anticipate the impact of service disruptions and to understand the levels of utilisation, availability and performance of our services. Effective use of an ITSM tool can save time and resource by automating and streamlining business processes. As a sector we need to work much more closely with our ITSM Tool partners and suppliers to ensure that we are leveraging the significant investment we make in these products.

## 11.6 Performance metrics

Many organisations are moving away from reporting on metrics and instead focusing on measuring business value. The move away from the standard productivity measurements will require service desks to find more sophisticated ways of measuring what is important to their organisations and to their customers.

Critical success factors and key performance indicators should be designed using a top down approach, showing how the service desk is supporting the overall aims and objectives of both the service and the wider university and reporting activities should aim to focus on value to the customer and how the service is improving over time.

## 11.7 Customer engagement

Service desks will continue to play a significant role in managing relationships. Incorporating the student voice into our services is not particularly easy but is essential if we want to deliver services that support student needs and expectations. Students are the experts when it comes to student experience and enabling the real student voice means listening and acting. Student engagement activities can range from regular meetings with student unions, running focus groups and workshops or using student bloggers to report on their experiences of using our services. Undertaking such activities will help us develop a greater insight into how students access and use the services and technology we offer.

Understanding how satisfied our customers are with both the services and the support they receive is absolutely critical for the service desk. We should be looking to implement comprehensive perception programmes that gather feedback from a range of channels that will help the service desk identify and prioritise service improvements.

## 11.8 Quality assurance

The Higher Education Service Desk Benchmarking Report demonstrates that there has been a substantial signs of growth in the number of universities using best practice frameworks and standards, ITIL remains the most popular with the service desk certification standard the second most popular. This demonstrates that universities are continuing to strive to professionalise their services to better meet the needs of their customers.

## 11.9 Communication and marketing

Your service desk should be setting the standards for professional communication in your organisation/department and communication needs to flow freely between your service desk, your support function (including second and third line support), the management teams and key stakeholders. Succinct, timely and effective communication is a sign of a high performing service desk so you should be striving to create a culture of openness and transparency.

You should work to enhance the credibility and reputation of your service desk by investing in promoting and marketing of the service. It is important to determine what channels will be used for this as marketing materials can take many forms. However, the most effective form of promotion is personal recommendation. Make sure you take the time to speak positively and publicly about your front line support services and always ensure you encourage customers to use the service desk.

Managing user expectations is really important and users need to be aware of what services are on offer and what levels of service they can expect. By setting out clearly the service offering (via a service catalogue) you can manage these expectations and ensure customers are prepared for the interactions to come.



## 12 Conclusion

It is testament to the striving for professionalism and the willingness of universities to listen, recognise and support the needs of its customers that we have seen a significant increase in the number of organisations developing their service desks in recent years. Between the 2014<sup>46</sup> and 2016 Higher Education Service Desk Benchmarking Report<sup>47</sup> we have seen a number of universities invest in a service desk approach, providing considerable investment in the adoption of best practice frameworks and standards and in training for front line support staff. This positive step should start to show a return on investment as we focus on continuous improvement and delivering high levels of professionalism within our support communities.

You can choose to take an adopt and adapt approach to using this Toolkit, taking elements of the guidance to address specific issues that you may be experiencing on your desk. However, given the critical role the service desk plays in student experience, is it time for you to take a longer term strategic approach? This Toolkit can provide you with a guide for continual service improvement and you can use it to help create and develop a sector leading service. There is nothing in this Toolkit that will conflict with other frameworks such as Service Desk Certification or Customer Service Excellence, rather it will provide you with practical advice and guidance on implementing good practice to help you improve your service offering.

46 Cherwell, SDI and UCISA (2014) UK Higher Education Service Desk Benchmarking Report 2014 [www.ucisa.ac.uk/bestpractice/surveys/service\\_desk/2014](http://www.ucisa.ac.uk/bestpractice/surveys/service_desk/2014)

47 SDI, UCISA and TopDesk (2016) UK Higher Education Service Desk Benchmarking Report 2016 [www.ucisa.ac.uk/publications/bechmark\\_sdi](http://www.ucisa.ac.uk/publications/bechmark_sdi)



# 13 Annex - Example resources to accompany the Toolkit

This section provides examples of actual documents and resources created and used successfully by organisations in the educational sector.

They are largely published as supplied – the text, style and tone of these documents have not been altered to match the remainder of this document.

They are not intended to be perfect, nor to be used verbatim by the reader, but to provide concrete examples of what has worked for others.



# Resources for Chapter 1 - Core information

## RESOURCES

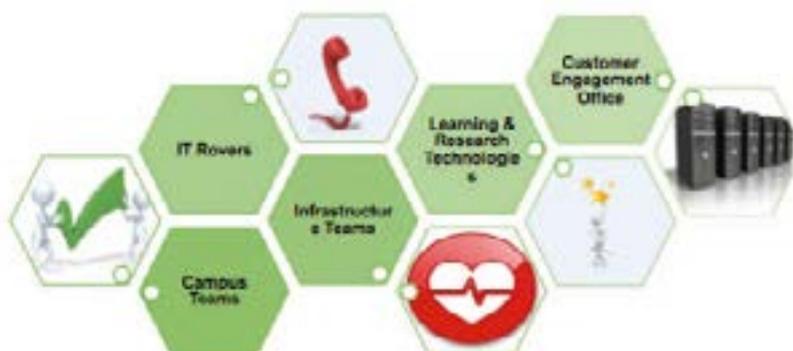
- [Key stakeholders of the service desk – Manchester Metropolitan University](#)
- [Making the best use of the IT Support Centre – University of Manchester](#)
- [Out of hours support statement – University of Leeds](#)
- [Template for an IT Help Desk manual \(headings\) - Robert Gordon University](#)

# Key stakeholders of the service desk – Manchester Metropolitan University

## Extended Colleagues



## Core Colleagues



## Core Suppliers

## Extended Suppliers



## Should I call, or use self service?

The IT Support Centre offers different types of support.

Urgent queries are best dealt with by telephone, but some instructions are easier to follow on screen.

| Call us if...   |
|---|
| You have an IT security incident, such as a compromised IT account or virus |
| You're unable to work   |
| You have an imminent deadline   |
| A problem is affecting a large number of colleagues                         |
| A problem is affecting a 'business critical' service                        |

| Use the website if...                                   |
|---|
| You are checking on the progress of an existing request |
| You have a viable workaround to a problem               |
| You have a long deadline                                |
| You want to read step-by-step instructions              |
| You are making a general IT request                     |

## When is the best time to call?

Our lines are open 24 hours a day, 7 days a week, but some times are busier than others.

If you'd like to speak to us, but it's not urgent, use the chart below to find out the best time to call us on the telephone.

|                | Monday | Tuesday | Wednesday | Thursday | Friday |
|----------------|--------|---------|-----------|----------|--------|
| 8am - 10am     | Red    | Red     | Yellow    | Yellow   | Yellow |
| 10am - 12 noon | Yellow | Yellow  | Yellow    | Green    | Green  |
| 12 noon - 2pm  | Red    | Red     | Red       | Red      | Red    |
| 2pm - 4pm      | Yellow | Yellow  | Green     | Green    | Green  |
| 4pm - 5pm      | Red    | Yellow  | Green     | Green    | Green  |

|                             |        |
|-----------------------------|--------|
| Monday to Friday, 5pm - 7pm | Yellow |
| Monday to Friday, 7pm - 8am | Green  |
| Saturday and Sunday         | Green  |

Key:  Busy  Moderately busy  Least busy

This information is not a guarantee of availability; it is taken from statistics relating to telephone calls on an average week, and is subject to change, especially during busier times of the year such as welcome week, the first week of the academic year, or in the case of an incident affecting a large number of people at the University.

We will let you know about any major incidents on Twitter, so if you see your issue on @UoM ITS, there is no need to call, we're working hard to fix it.

## **Out of hours support statement - University of Leeds**

At the University of Leeds we provide an evening and weekend service via a dedicated Remote and Out of hours team. Their duties are split across the IT Service Desk and the Cluster service. They operate throughout the week between 5pm and 9pm and on weekends between 12 noon and 5pm.

However, they do not operate over the summer vacation period (Mid-June to Early September).

Much like the day team, they offer face to face, phone and email support.

## **Template for an IT Help Desk manual (headings) - Robert Gordon University**

**IT Help Desk Background, Purpose & Aims**

**Roles and Responsibilities**

**Tools & Software, inc RMS**

**Telephone setup**

**Accessing Help Desk Voicemails**

**Help Desk Visitor service**

**Getting Started on the Service Desk**

- Ways People can Contact Us
- Importance of Logging Everything

**Getting Started on the Help Desk**

- Start and End of Shift Procedures
- Out of Hours Service

**Handling Help Desk Telephone Calls**

**Call Handling Checklist**

**Logging New Calls in RMS**

**Call Processing Priorities**

**VIP calls in RMS**

- Summary of current SLAs

**Managing IT Help Desk Emails**

- Handling call updates
- Handling external emails
- Handling junk emails
- •Handling emails enquiring about studying at AU
- Handling requests to contact a staff/student

**Help Desk Voicemails & Voicemail Greeting**

**No Calls Passed 20 Days – call closure procedure & example**

**Team Buddies**

**Team Meetings**



# Resources for Chapter 2 - Mission and Vision

## RESOURCES

- [IT Service Desk vision and mission – University of Leeds](#)



**UNIVERSITY OF LEEDS**

### IT Service Desk Vision & Mission

#### University Mission & Aim

The University of Leeds will integrate world class research, scholarship and education. We are a research intensive university that has a strong enduring reputation. We will strive to:

- Create, advance and disseminate knowledge
- Develop outstanding graduates and scholars
- Make an impact on global society

#### IT Mission & Aim

The IT Vision is to create IT services that are capable of shaping, enabling and delivering systems, services and processes that support the strategic objectives of the University in a way that embraces University values, aspiration and ambition.

IT will directly enable the University's distinctive ability to integrate world class research, scholarship and education.

The IT Mission is to develop and deliver the right skills, services and solutions in partnership with our staff, students and other University stakeholders to meet the changing needs of this world class, research intensive University in an agile, proactive and collaborative manner.

#### Vision & Mission

Our Vision for the future is to remain as a sector leading IT Service Desk and achieve 4 star certification by 2016.

Our Mission is that we will support the University and IT by providing effective resolutions to daily IT challenges and enhance the productivity of our users. Our aim is to provide a friendly, helpful and customer focused point of contact for staff, students and visitors. We also provide a software and hardware computer repair service. We will:

- Respond to users in an effective and timely manner
- Increase customer satisfaction through proactive stakeholder engagement
- Increase staff satisfaction by attracting, supporting and developing staff
- Provide high quality support services through Continual Service Improvement

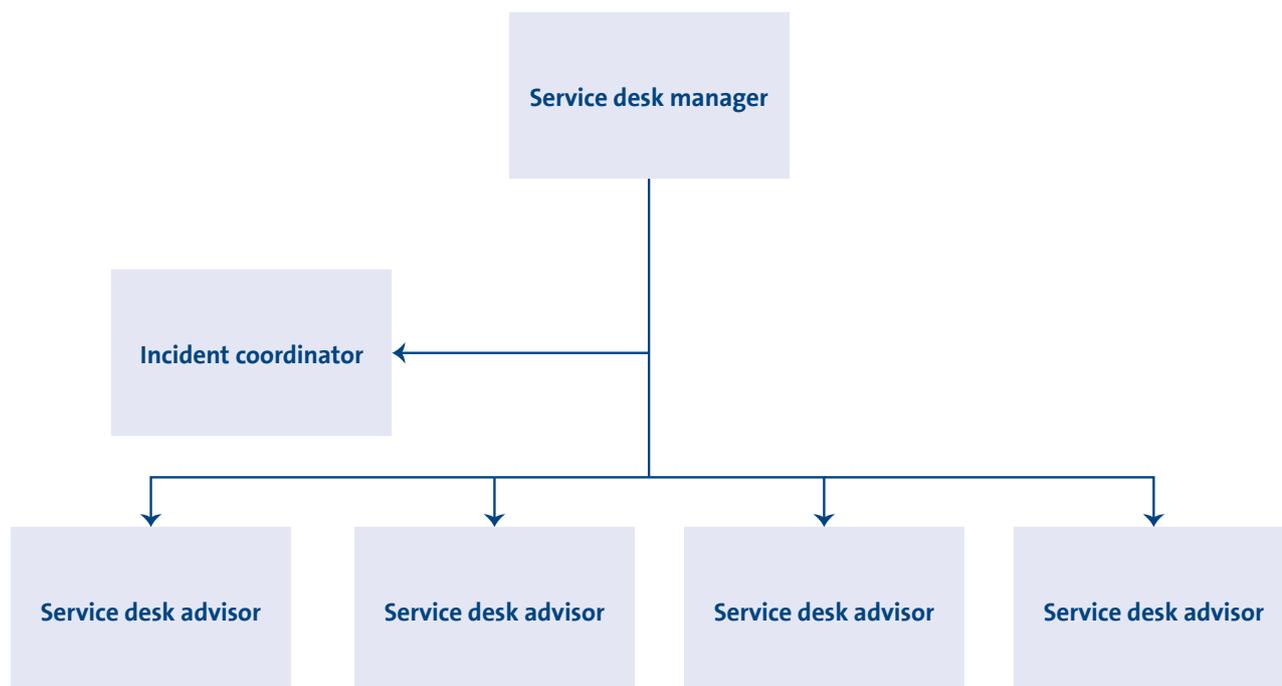


# Resources for Chapter 3 - Service desk structure and resourcing

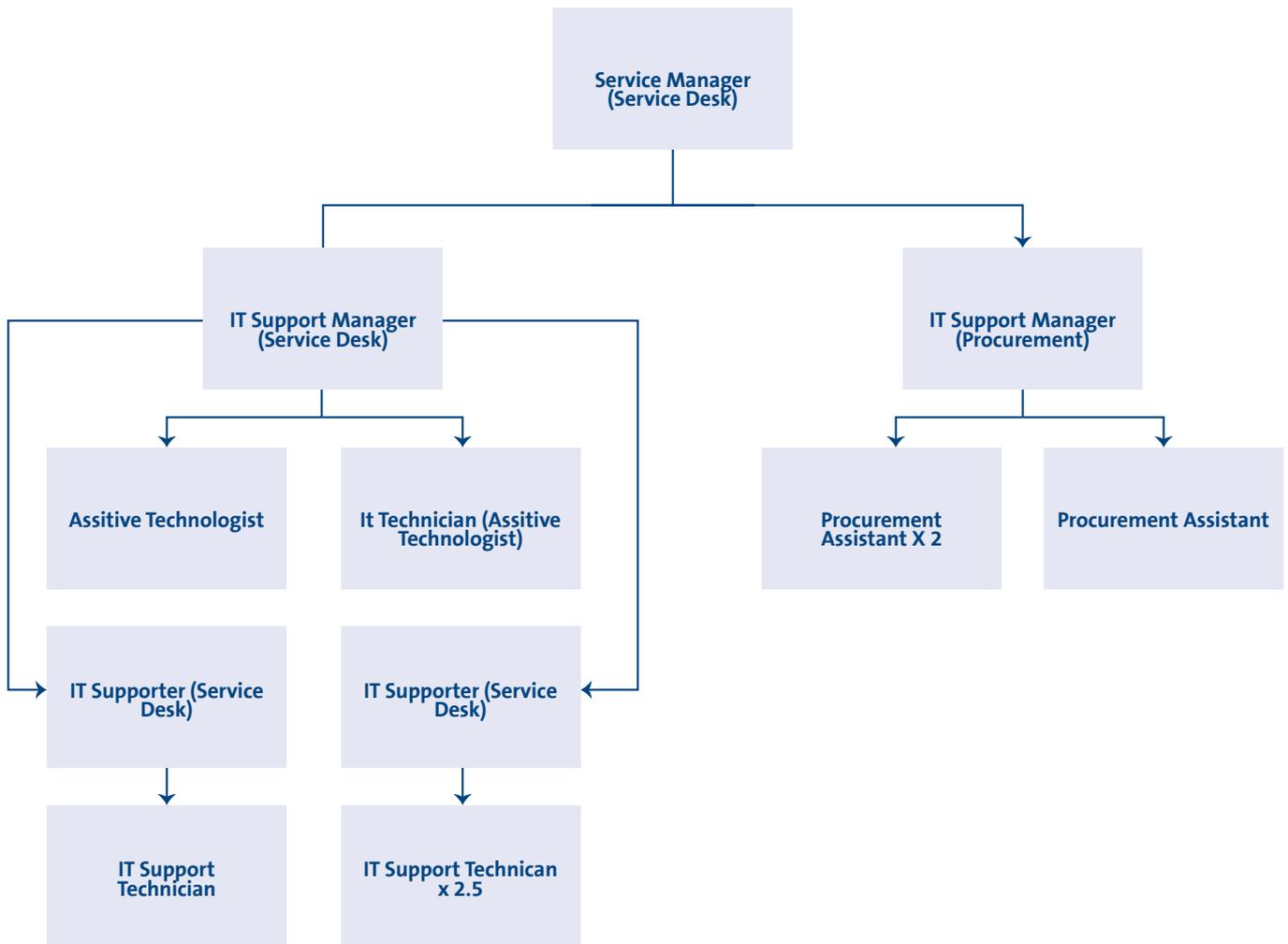
## RESOURCES

- Example- service desk organisation structure
- Service desk organisation structure – University of Bath
- Service desk organisation structure – Leeds Beckett University
- IT Support Technician job description– University of Bath
- IT Supporter (Service Desk) job description – University of Bath
- IT Support Manager (Service Desk) job description – University of Bath
- Service Manager (Service Desk, ITP and Assistive Technology) job description – University of Bath
- Incident Coordinator job description - Manchester Metropolitan University
- ITSM Toolset Coordinator job description – Manchester Metropolitan University

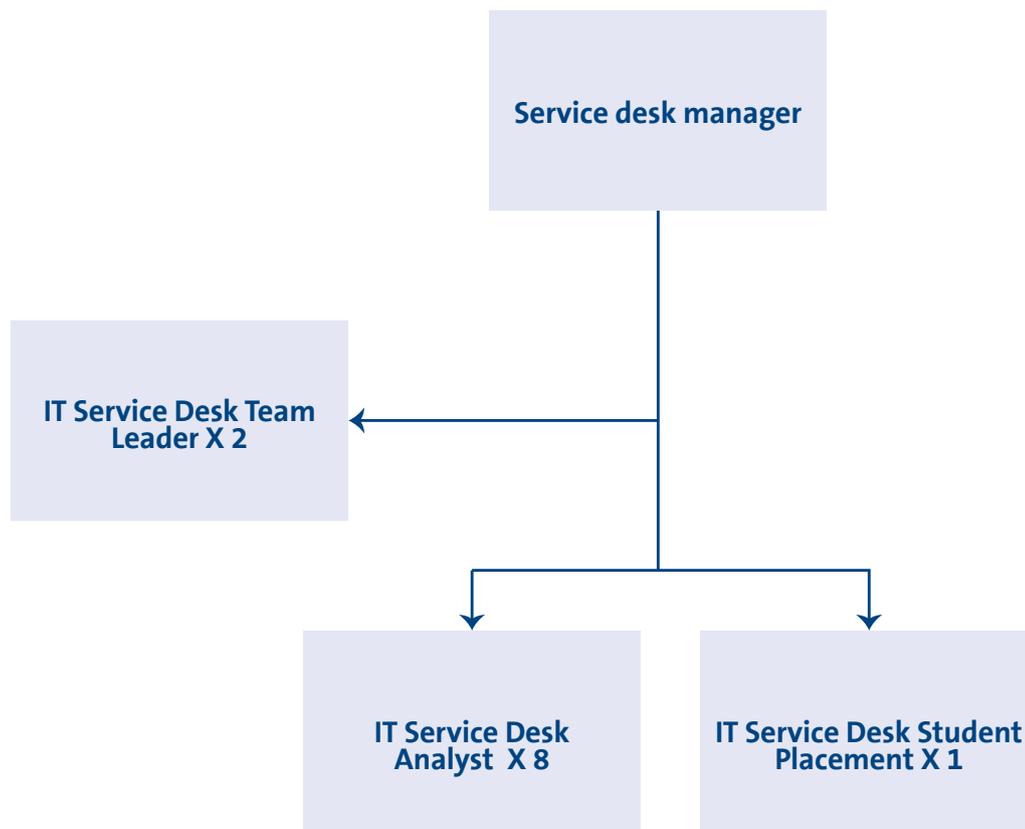
## Example - service desk organisation structure



## Service desk organisation structure – University of Bath



## Service desk organisation structure – Leeds Beckett University



## IT Support Technician job description – University of Bath

### Job purpose

The IT Support Technician will provide a professional, effective, knowledgeable and rapid IT support to staff and students as needed in the University. They will triage, resolve or escalate support calls within agreed timescales using IT Service Management principles and logging system.

The post-holder will be part of a team responsible for the smooth operation of the Computing Services Service Desk 'counter' providing a range of support, booking, sales and loans services to the University's staff and students.

### Main duties and responsibilities

1. Receive and handle requests for support following agreed procedures. Respond to requests for support by providing information to enable incident resolution and promptly allocate unresolved calls as appropriate. Maintain records and advise relevant persons of actions taken.
2. Investigate problems in systems and services and assist with the implementation of agreed remedies and preventative measures.
3. Develop, document and implement changes based on requests for change whilst applying change control procedures.
4. Carry out agreed operational procedures, including installation and maintenance and identify operational problems and contribute to their resolution.
5. Maintain knowledge of specific technical specialisms, and provide advice regarding their application.
6. Contribute to the delivery of small projects when required monitoring costs, timescales and resources used.
7. Communicate effectively with customers, team members and colleagues across the University.
8. Take responsibility for own workload and keep others informed, highlighting potential problems and suggesting solutions to ensure continuity of service delivery.
9. Identify and resolve issues with applications, following agreed procedures and carry out agreed applications maintenance tasks.
10. Use system management software and tools to collect agreed performance statistics and carry out agreed system software maintenance tasks.

## IT Supporter (Service Desk) job description – University of Bath

### Job purpose

The IT Supporter will be actively involved in the day-to-day delivery of an effective IT Support Service to the University. The post-holder will act as the point of escalation for incidents and changes and will provide technical leadership and expertise in their area. They will lead a small team of IT Support Technicians and will be responsible for deploying them in an effective manner as priorities change. The post-holder will assist in developing the IT Support Service, whilst maintaining positive relationships with the customer-base and staff within the Computing Services Department.

### Main duties and responsibilities

1. Ensure that incidents and requests are handled according to agreed procedures instigating escalation procedures to third line support or line managers, if necessary.
2. Investigate problems in systems and services and assist with the implementation of agreed remedies and preventative measures.
3. Assess, analyse, develop, document and implement changes based on requests for change.
4. Undertake routine installations and de-installations of items of hardware and/or software within established safety and quality parameters. Correct malfunctions, calling on other experienced colleagues and external resources if required, and document details of all hardware/software items that have been installed and removed.
5. Identify and resolve issues with applications, following agreed procedures and carry out applications maintenance tasks.
6. Using the ITSM system, ensure that all work is logged, allocated and prioritised for a timely and efficient resolution.
7. Define, document and carry out small projects or sub-projects alone or with a small team, actively participating in all phases, identifying, assessing and managing project risks and preparing realistic plans (including quality, risk and communications plans).
8. Promote models for through-life costing of IT assets. Work with managers to develop IS/IT budgets and identify bulk purchasing opportunities whilst adhering to University financial rules and regulations.
9. Communicate effectively acting as a key liaison with customers, team members and colleagues across the University.
10. Design, create and test complex, well-engineered information deliverables and manage the configuration of documentation items and files, within own area of responsibility.
11. Take responsibility for own and teams' workload and keep others informed, highlighting potential problems and suggesting solutions to ensure continuity of service delivery.
12. Promote and assist in the implementation of strategies, policies and procedures that seek to guide and shape the IT Support Service delivered by Computing Services.
13. Lead members of the team, to develop their skills both individually and as a team so that they can provide the best service to the University including the induction, appraisal/SPDR and performance management of team members and the management of sickness/absence and conduct etc.
14. Apply and maintain specific security controls as required by organisational policies and local risk assessments to maintain confidentiality, integrity and availability of business information systems and to enhance resilience to unauthorised access.

## IT Support Manager (Service Desk) job description – University of Bath

### Job purpose

The IT Support Manager will be responsible for the day-to-day delivery of an IT Support Service to University Faculties, Schools and Departments. Monitoring and reporting on service requirements, they will assist in developing the IT Support Service, whilst nurturing positive relationships with the customer-base and staff within the Computing Services Department. The post-holder will provide professional leadership and operational management to the team, taking responsibility for the management and development of the team, implementing service standards and developing common systems and processes based on industry best practice. They will ensure that the IT Support Service is efficient, effective and can adapt to changing circumstances.

### Main duties and responsibilities

1. Ensure that incidents and requests are handled according to agreed procedures and ensure that documentation of the supported components is available and in an appropriate form for those providing support.
2. Ensure that appropriate action is taken to anticipate, investigate and resolve problems in systems and services ensuring that such problems are fully documented within relevant system(s). Coordinate the implementation of agreed remedies and preventative measures and analyse patterns and trends.
3. Develop implementation plans for dealing with complex requests for change or for the introduction of new services, evaluating risks to integrity of infrastructure inherent in proposed implementations and review the effectiveness of change implementation.
4. Line-manage all members of the team, to develop their skills both individually and as a team so that they can provide the best service to University including the induction, appraisal/SPDR and performance management of team members and the management of sickness/absence and conduct etc.
5. Lead, manage and direct the team to support all aspects of the IT Support Service, taking operational responsibility for the team, including where day-to-day management has been delegated.
6. Analyse business processes identifying alternative solutions and recommending new approaches. Help establish requirements for the implementation of changes in business processes.
7. Take responsibility for the definition, documentation and satisfactory completion of medium-scale projects identifying, assessing and managing risks to the success of the project. Ensure that realistic project and quality plans are prepared and maintained and provide regular and accurate reports to stakeholders as appropriate.
8. Promote models for through-life costing of IT assets and services. Work with managers to develop IS/IT budgets and identify bulk purchasing opportunities whilst adhering to University financial rules and regulations.
9. Communicate effectively acting as a key liaison with customers, team members and colleagues across the University.
10. Design and create structured documentation that deals with complex information and manage the configuration of documentation items and files, within own area of responsibility.
11. Take responsibility for own workload and keep others informed, highlighting potential problems and suggesting solutions to ensure continuity of service delivery.
12. Promote and assist in the implementation of strategies, policies and procedures that seek to guide and shape the IT Support Service delivered by Computing Services.
13. Maintain an in-depth knowledge of specific technical specialisms, and provide expert advice regarding their application.
14. Under the guidance of the IT Security Manager, conduct security risk and vulnerability assessments for defined business applications or IT installations in defined areas, and provide advice and guidance on the application and operation of elementary physical, procedural and technical security controls.

## Service Manager (Service Desk, ITP and Assistive Technology) job description – University of Bath

### Job purpose

The Service Manager will be responsible for the provision of effective technology and support services to meet the requirements of the University's staff and students. The post-holder will be expected to establish and maintain positive relationships with staff, students and all levels of the Computing Services department.

The post-holder will be responsible for the management and development of the Service Desk, and IT Procurement functions and will lead a team of IT Support Managers, IT Supporters and Technicians. They will be accountable for the Incident Management and Change Management processes and be responsible for their implementation and improvement.

### Main duties and responsibilities

1. Recognise the potential strategic application of technology, and initiate investigation and development of innovative methods of exploiting assets, to the benefit of the University. Play an active role in improving the interface between the University and Computing Services.
2. Analyse business processes, identifying alternative solutions and recommending new approaches. Help establish requirements for the implementation of changes in business processes.
3. Provide organisational leadership and guidelines to promote the development and exploitation of technical knowledge in the organisation.
4. Line-manage all members of the team, to develop their skills both individually and as a team so that they can provide the best service to the University including the induction, appraisal/SPDR and performance management of team members and the management of sickness/absence and conduct etc.
5. Review IT services for compliance with organisational policy and legislation specifying any required changes.
6. Interpret security policy and contribute to the development of standards and guidelines that comply with this. Perform risk assessment and business impact analysis for major information systems within the organisation.
7. Take responsibility for the definition, documentation and satisfactory completion of medium-scale projects identifying, assessing and managing risks to the success of the project. Ensure that realistic project and quality plans are prepared and maintained and provide regular and accurate reports to stakeholders as appropriate.
8. Promote models for through-life costing of IT assets. Work with managers to develop IS/IT budgets and identify bulk purchasing opportunities whilst adhering to University financial rules and regulations.
9. Communicate effectively acting as a key liaison with customers, team members and colleagues across the University.
10. Design and create structured documentation that deals with complex information and manage the configuration of documentation items and files, within own area of responsibility.
11. Identify and manage resources needed for the planning, development and delivery of specified IT, AV and communications services influencing senior level customers and project teams through change management initiatives, ensuring that the infrastructure is managed to provide agreed levels of service and data integrity.
12. Contribute to strategies, policies and procedures that seek to guide and shape the services delivered by Computing Services.
13. Be accountable for the definition, ownership and development of one or more technology services on behalf of Computing Services, and represent the wider community of service users within the University.
14. Set direction and provide leadership in the introduction and use of techniques, methodologies and tools, to match overall business requirements (both current and future), ensuring consistency across all user groups.

## Incident Coordinator job description – Manchester Metropolitan University

Maintain operational coordination of the team including managing shifts, acting as a senior advisor to the team and handling quality compliance issues

Ensure incoming emails are promptly assigned to Service Desk Advisors for follow-up and their workload is balanced across the team

Ensure overall knowledge and procedures of the IT Helpline are captured, maintained, reviewed and available to the Helpline team and beyond

Provide initial coordination and communication of all major incidents, ensuring:

Initial symptoms are identified, documented and passed on to the relevant team for investigation

Any subsequent cases are linked to the correct parent case

The incident is communicated as per major incident communication guidelines

The major incident process is followed

Plan and deliver induction training on procedures for new starters and extended helpline

Identify patterns in incidents and highlight these for problem management purposes

Promote a work ethic of delivering excellent standards, resolving queries efficiently and effectively.

Deputise for the Service Desk Manager as appropriate.

## ITSM Toolset Administrator job description – Manchester Metropolitan University

Develop, deliver and support the service management toolset, including the core service management software, integrated applications and reporting platform:

Act as the owner and be responsible for the design, engineering, support and service delivery of the overall service management system solution, using either in house capabilities or external partners.

Provide first line and second line support to users; utilise business analysis and excellent overall IT knowledge, including software development and database management, to deliver enhancements and service improvements.

To be an ITSM toolset expert, taking responsibility for developing and delivering processes, services and technical requirements associated with running and operating a critical service function.

Provide in depth technical expertise on service management projects, ensuring maximum business benefit is derived from the service management toolset, helping the University in its mission to enhance the student experience.

Specify, test and implement configuration changes and enhancements to service management systems, including system interfaces, data loads and reports, following Change Management and Release & Deployment Management processes, ensuring any changes are effectively communicated to stakeholders.

Work closely with and advise individual process managers and owners, to ensure that the system implications of any proposed process changes are fully understood and incorporated by the system.

Work closely with the software vendors on behalf of the University, ensuring any agreed requirements are incorporated by the vendors, and verifying their output.

Create, amend and publish service reports, dashboards and metrics according to business requirements, to enable an overview of service quality and performance.

Ensure the service management systems meet information security requirements.

Develop and deliver training for staff in IT service management topics using a variety of formats in order to help them make effective use of the service management toolset.

Ensure that the system design, processes, workflows and any changes are fully documented and documentation is kept up-to-date.

# Resources for Chapter 4 - People

## RESOURCES

- IT Technician job advert – University of Bath
- Service Desk Manager job advert – Leeds Beckett University
- Service Desk induction timetable – Manchester Metropolitan University
- Helpline induction timetable example – University of Edinburgh
- Probation form – University of Edinburgh
- Service desk meetings template
- One to one template – University of Bath
- IT Support Advisor training plan – University of Leeds
- Annual development review (Grades 1 - 6) – University of Edinburgh
- Annual development review (Grades 6 - 10) – University of Edinburgh
- Personal development plan template – University of Bath
- Skills matrix – University of Edinburgh
- Service Desk skills matrix example – Manchester Metropolitan University
- IT Service Desk staff satisfaction survey – University of Leeds
- Social responsibility – Manchester Metropolitan University
- Social responsibility – University of Leeds

## IT Technician job advert – University of Bath

This is an exciting opportunity for a skilled IT professional ideally with a background in and a passion for IT support and service delivery to join our Service Desk team within the University of Bath's Department of Computing Services.

Our IT Technicians provide customer focused, friendly assistance for staff and students in person, by phone, email or other electronic means. They ensure that phone calls and other communications are handled in a customer friendly and professional manner and are recorded appropriately in our call management system using clear written communication.

You will provide sympathetic advice to customers on their IT queries, remaining calm under pressure, and where possible resolving their query or problem at first contact. You will also follow standard diagnosis routines to identify the caller and type of problem gaining sufficient information to resolve the query or where applicable to escalate to other teams within Computing Services and the wider University community.

You will be expected to contribute to discussions about improving methods of working, to follow those methods once agreed and to document and maintain those methods so they become knowledge for staff across Computing Services.

As part of our ongoing commitment to improve customer experience and continual service improvement, we are implementing policies and procedures based on the ITIL framework. Knowledge and experience of working in such a framework would be advantageous as would experience of the usage of ITSM systems.

The University of Bath is one of the UK's top 10 Universities with an international reputation for research and teaching at the highest academic standards. The University's buildings are set in an attractive campus about a mile from the centre of Bath, a World Heritage City.

Interviews will take place on Tuesday 22nd November. For an informal discussion about this role, please contact XXX, Service Manager (Service Desk) by email: XXX@bath.ac.uk

## **Service Desk Manager job advert – Leeds Beckett University**

We are looking for the right candidate to build and develop a customer focused, sector-leading IT Service Desk. You will be responsible for the provision of responsive and effective first line support services, supporting a wide range of desktop, mobile, printing and audio visual media technologies as well as a Media Equipment Loans Service. You will also be responsible for ensuring that the Service Desk team have the right skills and knowledge to deliver high quality support services and for driving up first time fix rates.

You will have a proven track record of leading, motivating and managing a team. You will also have excellent communications skills, along with an ability to plan, implement and lead service improvement initiatives. Additionally, you will be committed to service delivery and customer service excellence and will promote this ethos within both the team and the department. You will have a passion for understanding the current and future technology landscape and possess a strong knowledge of IT Service Management processes and frameworks including ITIL and Service Desk Certification.

## Service Desk induction timetable – Manchester Metropolitan University

Week one

| Time        | Monday  | Tuesday  | Wednesday                                      | Thursday   | Friday   |
|-------------|---|--|--|--|--|
| 09:00-09:30 | Welcome and introduction session with manager | Topics Revision / Service Desk Handbook                            | Topics Revision / Department Strategy          | Health & Safety, Data Protection, Equality and Diversity | Topics Revision                                    |
| 09:30-10:00 |   | Guest accounts: Process, tools and overview of other account types |  |  | Library e-Resources, Common errors                 |
| 10:00-10:30 | Service Management Tool Overview              |  | Software install/ update: Process and tools    | Student records system: access and overview              |  |
| 10:30-11:00 | Introduction to Telephony                     | Call Listening   |  |  | Call Listening                                     |
| 11:00-11:30 |   |  | Remote support tools                           | Own study / Service Catalogue                            |  |
| 11:30-12:00 | Own study / Service Catalogue                 | Lunch 45 mins  | Lunch 45 mins                                  |  | Lunch 45 mins                                      |
| 12:00-12:30 |   |  |  | Lunch 45mins   |  |
| 12:30-13:00 | Call Listening                                | Staff email: process, troubleshooting and spam / phishing          | Loan Laptops: support & general info           |  | Network services: Wired, Wireless and Port changes |
| 13:00-13:30 |   |  |  | Call Listening   |  |
| 13:30-14:00 | Passwords: Policy, process and tools          | Hardware/Software Purchasing: Process and tools                    | Virtual Learning Environment and Student Email |  | Client VPN and web VPN: Process and tools          |
| 14:00-14:30 |   |  |  | Passwords: Policy, process and tools                     |  |
| 14:30-15:00 | Own study / Training feedback                 | Own study / Training feedback                                      | Own study / Training feedback                  |  | Own study / Training feedback                      |
| 15:00-15:30 |   |  |  | Own study / Training feedback                            |  |
| 15:30-16:00 | Own study / Training feedback                 | Own study / Training feedback                                      | Own study / Training feedback                  |  | Own study / Training feedback                      |
| 16:00-16:30 |   |  |  | Own study / Training feedback                            |  |

Week two

| Time        | Monday   | Tuesday                            | Wednesday                          | Thursday          | Friday            |   |
|-------------|--|------------------------------------|------------------------------------|-------------------|-------------------|---|
| 09:00-09:30 | Recap of previous week   | Call listening / Email queue       | Live with Support / Call listening | Live with Support | Live with Support |   |
| 09:30-10:00 |  |                                    |                                    |                   |                   |   |
| 10:00-10:30 |  |                                    |                                    |                   |                   |   |
| 10:30-11:00 |  |                                    |                                    |                   |                   | Devices: Supported versus not supported |
| 11:00-11:30 |  |                                    |                                    |                   |                   | Call listening / Email queue            |
| 11:30-12:00 |  |                                    |                                    |                   |                   |   |
| 12:00-12:30 |  |                                    |                                    |                   |                   |   |
| 12:30-13:00 | Lunch 45mins   | Lunch 45 mins                      | Lunch 45 mins                      | Lunch 45 mins     | Lunch 45 mins     |   |
| 13:00-13:30 |  |                                    |                                    |                   |                   |   |
| 13:30-14:00 | Own Study/Email queue  | Live with Support / Call listening | Live with Support / Call listening | Live with Support | Live with Support |   |
| 14:00-14:30 | General online services; Sites not supported by ITS & escalation |                                    |                                    |                   |                   |   |
| 14:30-15:00 |  |                                    |                                    |                   |                   |   |
| 15:00-15:30 | Call listening / Email queue                                     |                                    |                                    |                   |                   |   |
| 15:30-16:00 |  |                                    |                                    |                   |                   |   |
| 16:00-16:30 |  |                                    |                                    |                   |                   |   |

## Helpline induction timetable example – University of Edinburgh

New Staff systems access checklist – List of all systems access required - separate document

| Name       | UUN        | Staff No. | Category  | Team Leader  |
|------------|------------|-----------|-----------|--------------|
| Staff name | Login name | HR Number | Job Title | Manager name |

| Name                   | Time          | Event  | Location |  |
|------------------------|---------------|--|----------|--|
| Wednesday 4th November | 09:30 - 11:00 | Welcome & Induction including Health & Safety induction          |          |  |
|                        | 11:00 - 12:00 | Review Knowledgebase, check systems access & do Skills Matrix    |          |  |
|                        | 12:00 - 13:00 | Lunch  |          |  |
|                        | 13:00 - 14:00 | Check system access.   |          |  |
|                        | 14:00 – 15:00 | Desk set up & informal time with team                            |          |  |
|                        | 15:00 - 16:00 | ITSM introduction  |          |  |
|                        |               |  |          |  |
| Thursday 5th November  | 09:00- 13:00  | Windows 7 Build training   |          |  |
|                        | 13:00 - 14:00 | Lunch  |          |  |
|                        | 14:00 - 15:00 | Password reset training including use of student registry portal |          |  |
|                        | 15:00 - 16:00 | ADUC (Active Directory Computers and Users) \AD lookup Tool      |          |  |
|                        | 16:00 - 17:00 | DNS Registrations – registering computers on the network         |          |  |
|                        |               |  |          |  |
| Friday 6th November    | 09:00 - 11:00 | Visit Library Helpdesk   |          |  |
|                        | 11:30 - 13:00 | Learn/Moodle training  |          |  |
|                        | 13:00 - 14:00 | Lunch  |          |  |
|                        | 14:00 - 15:00 | Shadow Mobile Device Clinic                                      |          |  |
|                        | 15:00 - 16:00 | Shadow Duty Room   |          |  |
|                        | 16:00 - 17:00 | Review notes / timesheet   |          |  |

| Name                    | Time          | Event  | Location |  |
|-------------------------|---------------|--|----------|--|
| Monday 9th November     | 09:00 – 10:00 | Review week one notes                                |          |  |
|                         | 10:00 - 11:00 | Identity Management and Visitor Registration Service |          |  |
|                         | 11:00 - 13:00 | Shadow Duty Room                                     |          |  |
|                         | 13:00 - 14:00 | Lunch  |          |  |
|                         | 14:00 - 16:30 | Shadow Second line support                           |          |  |
|                         | 16:30 - 18:00 | Shadow evening process & handover                    |          |  |
|                         |               |  |          |  |
| Monday 9th November     | 09:00 – 10:00 | Review week one notes                                |          |  |
|                         | 10:00 - 11:00 | Identity Management and Visitor Registration Service |          |  |
|                         | 11:00 - 13:00 | Shadow Duty Room                                     |          |  |
|                         | 13:00 - 14:00 | Lunch  |          |  |
|                         | 14:00 - 16:30 | Shadow Second line support                           |          |  |
|                         |               |  |          |  |
| Tuesday 10th November   | 10:00 - 13:00 | Shadow Duty room                                     |          |  |
|                         | 13:00 - 14:00 | Lunch  |          |  |
|                         | 14:00- 17:00  | Apple Mac Support                                    |          |  |
|                         |               |  |          |  |
| Wednesday 11th November | 10:00- 13:00  | Shadow Second line                                   |          |  |
|                         | 13:00- 14:00  | Lunch  |          |  |
|                         | 14:00- 17:00  | Shadow Duty room                                     |          |  |
|                         | 14:00 - 15:00 | Lunch  |          |  |
|                         | 15:00- 17:00  | Shadow Second line                                   |          |  |

| Name                   | Time          | Event                             | Location | Event |
|------------------------|---------------|-----------------------------------|----------|-------|
| Thursday 12th November | 09:00-10:00   | Notes /training review            |          |       |
|                        | 10:00 - 12:00 | Visit College campus offices      |          |       |
|                        | 12:00 - 14:00 | Mobile device clinic shadow       |          |       |
|                        | 14:00 - 15:00 | Lunch                             |          |       |
|                        | 15:00-17:00   | Shadow Second line                |          |       |
|                        | 16:30 - 18:00 | Shadow evening process & handover |          |       |
|                        |               |                                   |          |       |
| Friday 13th November   | 10:00-11:00   | Induction Review                  |          |       |
|                        | 11:00-13:00   | Shadow Duty room                  |          |       |
|                        | 13:00-14:00   | Lunch                             |          |       |
|                        | 14:00-17:00   | Shadow clinic / Second line       |          |       |
|                        | 14:00 - 16:30 | Shadow Second line support        |          |       |

## Probation form – University of Edinburgh

| 1. Personal Details      |                      |                            |                      |
|--------------------------|----------------------|----------------------------|----------------------|
| <b>Name of Employee</b>  |                      | <b>Employee Number</b>     |                      |
| <b>Division</b>          |                      | <b>Department</b>          |                      |
| <b>Grade</b>             |                      | <b>Line Manager</b>        |                      |
| <b>Start Date</b>        |                      | <b>Length of probation</b> | 6 months/ 12 months  |
| <b>First Review Date</b> | 2.5 months/ 3 months | <b>Second Review Date</b>  | 5.5 months/ 8 months |

| 2. Please complete with employee during review meeting and note if further action required. |        |  |
|---|--------|--|
| In the employees attendance satisfactory?<br>Total days absent from work:.....              | YES/NO |  |
| Is the employees timekeeping satisfactory?  | YES/NO |  |
| If training was identified at induction has it been completed?                              | YES/NO |  |
| Is there further training required?   | YES/NO |  |
| If objectives set at induction have they been met?  | YES/NO |  |
| Any further objectives set?   | YES/NO |  |
| Are there any other problems/issues that have been identified?                              | YES/NO |  |
| Has the employees performance and progress achieved a satisfactory standard?                | YES/NO |  |
| Any other comments  |        |  |

### 3. Confirmation

I confirm that the above notes represent an accurate record of the discussion and the actions/agreed way forward during the probation meeting.

Line Manager Signature

Employee Signature

Date

**Please send the completed and signed form to Human Resources**

N.B. Manager and Employee should retain a copy.

FOR GRADES UE06-10: HR for Information Services will seek confirmation of Successful completion of Probation Period at the 11 months stage.

## Service desk meetings template

|             |                |
|-------------|----------------|
| <b>Name</b> | <b>Date</b>    |
| <b>Time</b> | <b>Present</b> |

|                                 |
|---------------------------------|
| Manager – Updates / New Items : |
|                                 |

|                                     |
|-------------------------------------|
| Team Member – Updates / New Items : |
|                                     |

|   |  |
|---|--|
| Action points from previous meeting:      |  |
|   |  |
|   |  |
| Progress of objectives / targets:         |  |
|   |  |
|   |  |
| Induction / Training & Development / PDR: |  |
|   |  |
|   |  |
| Workload:                                 |  |
|   |  |
|   |  |
| On-going Projects:                        |  |
|   |  |
|   |  |
| Absence / Personal Matters:               |  |
|   |  |
|   |  |
| Any Other Business:                       |  |
|   |  |
|   |  |

### Agreed Actions:

| Action: | Owner: | By When? |
|---------|--------|----------|
|         |        |          |
|         |        |          |
|         |        |          |
|         |        |          |
|         |        |          |

## One to one template – University of Bath

|             |                |
|-------------|----------------|
| <b>Name</b> | <b>Date</b>    |
| <b>Time</b> | <b>Present</b> |

Managers Actions:

Training actions:

Personal actions:

Notes:

## IT Support Advisor training plan – University of Leeds

|       |                                 |
|-------|---------------------------------|
| Name: | Job Title:                      |
|       | Service Desk IT Support Advisor |

The purpose of this training plan is to document the overall training strategy for IT Support Advisors for the IT Service Desk. This training plan is intended to support the training and development of IT Support Advisors and will be used by the Service Desk Manager, Senior IT Support Advisor and IT Support Advisors.

| ID | Description  | Goals & Learning Outcomes  | When             | Where/Resource   |
|----|--|--|------------------|--|
|    | <b>Health &amp; Safety</b><br>H&S Induction<br>DSE Risk Assessment<br>DSE Training<br>Fire Safety Training<br>Manual Handling Training | To provide fire safety awareness training in accordance with Health and Safety legislation for fire safety, manual handling and display screen equipment (DSE)   | Within 2 weeks   | Online Module  |
|    | <b>Equality &amp; Diversity</b>  | To provide an introduction to the concepts of equality and diversity and gives an overview of the main legislation and its practical implications  | Within 1 month   | Online Module  |
|    | <b>IT Security Training</b>  | Provide a general awareness of IT Security issues and data protection  | Within 2 months  | VLE Online Module                                      |
|    | <b>ITIL &amp; ITSM Awareness</b>   | Provide a general awareness of the key elements, concepts and terminology used in the ITIL Service Lifecycle, including the linkages between Lifecycle stages, the processes used and their contribution to Service Management practices.  | Within 3 months  | Internal (presentation) or ITIL Foundation Certificate |
|    | <b>SDI Service Desk Analyst</b>  | Provide an understanding of the role and responsibilities of a Service Desk Analyst and an understanding of the role the Service Desk plays in any organisation. Give an overview of the importance of meeting commitments and delivering service excellence as well as looking at the attributes, skills, knowledge required to be a successful Service Desk Analyst. | Within 12 months | External training provider (SDI)                       |

## Annual development review (Grades 1-6) – University of Edinburgh

|             |                            |                  |                              |
|-------------|----------------------------|------------------|------------------------------|
| <b>Name</b> | <b>Staff No</b>            | <b>Division</b>  | <b>Reviewer/Manager Name</b> |
| <b>Date</b> | <b>Date of last review</b> | <b>Job Title</b> | <b>Review period</b>         |

### Section A - Self-Preparation (please read through guidelines before completing)

How am I Doing? (member of staff to complete in advance)

| Referring to relevant areas of your work, please describe what you feel has gone well in the past year. You may wish to consider the areas listed below:                            |  |
|---|--|
| Accuracy<br>Attention to detail<br>Meeting deadlines<br>Initiative<br>Customer focus<br>Team working<br>Enthusiasm/motivation<br>Problem solving<br>Communication<br>Projects/other |  |
| Again referring to the relevant areas of your work, describe what has not gone so well and give your thoughts on reasons for this and how they might be overcome in the future.     |  |
| Accuracy<br>Attention to detail<br>Meeting deadlines<br>Initiative<br>Customer focus<br>Team working<br>Enthusiasm/motivation<br>Problem solving<br>Communication<br>Projects/other |  |

### Last year's performance (member of staff to complete in advance)

| List the agreed objectives set out in the previous Annual Review and describe your progress in meeting these objectives. |          |
|--|----------|
| 1  | Progress |
| 2  | Progress |
| 3  | Progress |
| What else have you achieved in the last year?  |          |

## Training and Development (member of staff to complete in advance)

List the training you have had and the skills you have developed since the last review. Were there any training initiatives which did not happen?

What impact did training and development activities have on your effectiveness at work?

Indicate what personal development support and training you would like next year and in the longer term. Also consider any personal long-term objectives that could be assisted through training.

## Future Objectives (member of staff to complete in advance)

What are your priorities and objectives for next year?

In what way could your post move forward in the next 2-3 years?

## Annual Review Section B - Summary from Review Meeting

| Last year's Objectives (progress to be discussed and agreed on the day of the AR – manager to complete) |                 |
|---|-----------------|
| 1   | Agreed Progress |
| 2   | Agreed Progress |
| 3   | Agreed Progress |

## Summary of last year's performance (manager to complete)

|  |
|--|
|  |
|--|

| Future Agreed Objectives (to be discussed and agreed on the day of the AR – manager to complete) |                 |
|--|-----------------|
| 1  | Agreed Progress |
| 2  | Agreed Progress |
| 3  | Agreed Progress |

| Employee Comments on this year's AR (to be completed following the AR) |
|--|
|  |

| Managers Signature | Date |
|--------------------|------|
|                    |      |

| Employee Signature | Date |
|--------------------|------|
|                    |      |

## Annual development review (Grades 6-10) – University of Edinburgh

This form is intended as a prompt for discussion for you and your reviewer during your review

meeting. Please read through the guidelines before completing this document and also refer at the competencies for your grade <http://www.ed.ac.uk/schools-departments/human-resources/learning-development/dev-opportunities/leadership-development/competency-framework/overview> as you consider the questions below.

Complete the form (expand the text boxes as necessary) and send it to your reviewer at least 7 days in advance of your review meeting. A copy of last year's objectives /work plan/job description and a reflective summary (if you choose to do one) should be attached to this document.

**Pages 1 and 2 of the document are confidential to you and your reviewer, unless agreed otherwise by you.**

| Name of reviewee:- | Review Year | Date of Review |
|--------------------|-------------|----------------|
|                    |             |                |

| Division:- | Staff number:- |
|------------|----------------|
|            |                |

1. List the main areas of work/projects you have been involved in over the past year [general headings will do]. You may wish to refer to the key responsibilities in your job description. Highlight the competencies relevant to these projects/work areas.

2. Briefly list the progress and achievements you have made in your main areas of work in the past year, and the competencies you have used in these achievements. Be prepared to discuss these at your review meeting.

3. Briefly list any aspects of your work where outcomes have fallen short of your aspirations/goals. Give your thoughts on reasons for this and how they might be overcome in the future, with reference to the competencies needed. Be prepared to discuss these at your review meeting.

4. Looking ahead, list your key projects and/or objectives for the coming year. Highlight any areas of your work you would like to develop, or new areas, relevant to your work, in which you would like to become involved.

5. Taking account of your main work areas in the coming year and beyond, and the competencies needed to fulfil them, what support will you need for your development?

(6) Please note any other areas you wish to discuss

## AGREED ACTION PLAN

The reviewer records your agreed objectives and actions below. You and your reviewer will refer to this form and the personal development plan during the coming year and a copy of this years document will be required at your next review. Both forms will be kept on file.

| Name of reviewee:- | Date of review:- |
|--------------------|------------------|
|                    |                  |

| Division:- | Staff number:- |
|------------|----------------|
|            |                |

| Summary of discussion   |  |  |  |
|-------------------------|--|--|--|
| For the past year:      |  |  |  |
| For the following year: |  |  |  |

| Objectives/actions   | Action by whom | No. of competency) | Target date if applicable |
|--|----------------|--------------------|---------------------------|
| Please list the actions/objectives agreed, and enter the competency(ies) needed for each of the actions/objectives |                |                    |                           |
|  |                |                    |                           |
|  |                |                    |                           |
|  |                |                    |                           |
|  |                |                    |                           |
|  |                |                    |                           |
|  |                |                    |                           |

| Signature of Reviewee:- | Date |
|-------------------------|------|
|                         |      |

| Signature of Reviewer:- | Date |
|-------------------------|------|
|                         |      |

## AGREED DEVELOPMENT PLAN

| Name of reviewee:- | Review Year    | Date of Review |
|--------------------|----------------|----------------|
|                    |                |                |
| Division:-         | Staff number:- |                |
|                    |                |                |

Use this form to summarise any learning and development needs and actions, broken down by competency, as agreed with your reviewer, together with a target date for completion over the next year. Please also record any learning and development undertaken over the last year. A copy of this form must be passed to your divisional Business Administrator.

|  |
|--|
| 1. Being customer focused: Identifying, understanding and giving priority to meeting the needs of internal and external customers*, to provide the highest standards of service for the University.                        |
| 2. Influencing others: Developing and using a range of strategies to influence and persuade others, in order to gain acceptance and commitment   |
| 4. Managing finances and resources: Ensuring value for money by managing and monitoring budgets and making the best use of resources, within University regulations.   |
| 5. Planning and organising: Planning, prioritising and organising effectively to provide excellent services for the University.  |
| 6. Problem solving and decision making: Identifying and solving problems using insight and creativity, and making decisions which best fit University goals.   |
| 7. Pursuing professional excellence: Pursuing excellence in line with the delivery of the University's core goals and appropriate professional bodies, and working within appropriate legislative and regulatory contexts. |

COMMUNICATING AND WORKING WITH PEOPLE

DEVELOPING BUSINESS SUCCESS

8. Embracing change: Recognising and responding positively to the need for change, and seeking out opportunities to fulfil the need for change.

9. Thinking and acting strategically: Seeing the 'big picture' and harnessing ideas and opportunities to achieve the University's vision.

\*Students, the public, University staff or staff from other organisations and anyone affected, directly or indirectly, by your work

Use this space to details all training or learning & development you have undertaken in the last 12 months

|  |      |
|--|------|
| Signature of Reviewee:-                          | Date |
|  |      |
| Signature of Reviewer (please print name also):- | Date |
|  |      |

### Annual Review Section C - Summary from Review Meeting

Training and Development (a copy of this page should be sent to your Divisional Business Administrator – please refer to the guidelines for contact information)

| Name   | Staff No            | Division  | Reviewer/Manager Name |
|--|---------------------|-----------|-----------------------|
| Date   | Date of last review | Job Title | Review period         |
| <p>Use this form to summarise any learning and development needs and actions, as agreed on the day of the AR, together with a target date for completion over the next year.</p> |                     |           |                       |

|                    |      |
|--------------------|------|
| Managers Signature | Date |
|                    |      |
| Employee Signature | Date |
|                    |      |

## Personal Development Plan Template – University of Bath

|   |                      |
|---|----------------------|
| <b>Employee Name:</b>                       | <b>Department:</b>   |
| <b>Role:</b>                                | <b>Line Manager:</b> |
| <b>Performance Appraisal Period – From:</b> | <b>To:</b>           |

| Five Year Goal:                          |   |   |   |                         |
|--|---|---|---|-------------------------|
|  |   |   |   |                         |
| Learning and development need            | How will the need be met?                                     | Resources/support   | Success measures  | Completion date         |
| <i>e.g. Develop my leadership skills</i> | <i>e.g. Volunteer to lead a team on a forthcoming project</i> | <i>e.g. Seek leadership coaching from a relevant mentor, read up on leadership styles</i> | <i>e.g. Project success, line manager feedback, project team feedback</i> | <i>e.g. August 2013</i> |

## Skills matrix – University of Edinburgh

### Software

| Service / Product                 | Level 1 | Level 2 | Level 3 | Level 4 | Additional Comments |
|-----------------------------------|---------|---------|---------|---------|---------------------|
| Adobe Reader                      |         |         |         |         |                     |
| Chrome                            |         |         |         |         |                     |
| EndNote                           |         |         |         |         |                     |
| EndNote web                       |         |         |         |         |                     |
| Excel                             |         |         |         |         |                     |
| Firefox                           |         |         |         |         |                     |
| Internet Explorer                 |         |         |         |         |                     |
| Skype for Business (inc. Lync)    |         |         |         |         |                     |
| MS Access                         |         |         |         |         |                     |
| MS Word                           |         |         |         |         |                     |
| Office 2016                       |         |         |         |         |                     |
| Outlook                           |         |         |         |         |                     |
| Powerpoint                        |         |         |         |         |                     |
| Safari                            |         |         |         |         |                     |
| Skype                             |         |         |         |         |                     |
| SSH Secure Shell                  |         |         |         |         |                     |
| System Center Endpoint Protection |         |         |         |         |                     |
| Thunderbird                       |         |         |         |         |                     |

## Operating Systems / Supported Desktop

| Service / Product            | Level 1 | Level 2 | Level 3 | Level 4 | Additional Comments |
|------------------------------|---------|---------|---------|---------|---------------------|
| Apple Mac Supported desktop  |         |         |         |         |                     |
| Citrix                       |         |         |         |         |                     |
| Lab Desktop                  |         |         |         |         |                     |
| Mac OS X                     |         |         |         |         |                     |
| Bomgar                       |         |         |         |         |                     |
| Remote assistance offsite    |         |         |         |         |                     |
| Remote assistance onsite     |         |         |         |         |                     |
| Windows 7                    |         |         |         |         |                     |
| Windows 10                   |         |         |         |         |                     |
| Windows pc supported desktop |         |         |         |         |                     |

## File storage

| Service / Product       | Level 1 | Level 2 | Level 3 | Level 4 | Additional Comments |
|-------------------------|---------|---------|---------|---------|---------------------|
| Citrix                  |         |         |         |         |                     |
| Datastore               |         |         |         |         |                     |
| Datasync                |         |         |         |         |                     |
| Eddie (compute cluster) |         |         |         |         |                     |
| Encryption support      |         |         |         |         |                     |
| OneDrive                |         |         |         |         |                     |
| Staff file servers      |         |         |         |         |                     |
| Staff profile servers   |         |         |         |         |                     |

|                         |  |  |  |  |  |
|-------------------------|--|--|--|--|--|
| Student file servers    |  |  |  |  |  |
| Student profile servers |  |  |  |  |  |

## Interpersonal Skills

| Service / Product       | Level 1 | Level 2 | Level 3 | Level 4 | Additional Comments |
|-------------------------|---------|---------|---------|---------|---------------------|
| Spoken communication    |         |         |         |         |                     |
| Written communication   |         |         |         |         |                     |
| Attention to detail     |         |         |         |         |                     |
| Accuracy                |         |         |         |         |                     |
| Listening               |         |         |         |         |                     |
| Team working            |         |         |         |         |                     |
| Planning and organising |         |         |         |         |                     |
| Time management         |         |         |         |         |                     |
| Problem solving         |         |         |         |         |                     |
| Decision making         |         |         |         |         |                     |
| Leadership              |         |         |         |         |                     |
| Handling conflict       |         |         |         |         |                     |
| Influencing             |         |         |         |         |                     |

## Why are we being asked to fill this out?

A skills matrix allows us to ensure everyone is trained to the correct level for the services & products we support. We can ensure we have the correct level of training and awareness for our key services and that there are no services we are unable to support.

## Who is being asked to complete the Skills Matrix?

Everyone in User Support - all new staff will complete a skills matrix as part of their induction

## What is a Skills Matrix?

A skills matrix is a table listing all the services, software, operating systems and processes that we are expected to support as a team. Next to each service are boxes for you to mark your current level of awareness or ability to support the service/product in question based on this scale:

Level 1 - I know nothing about this service, product or process

Level 2 - I understand this service, product or process but have not yet used it or followed it.

Level 3 - I know this service, product or process well enough to support it

Level 4 - I know this service, product or process well enough to train others to use it.

## Does everyone need to be a 'level 4' on all the services and products?

No. Some services are core to University Business (for example Office 365) and need most/ all of the team to be able to support them. Other services are used less or require less support (for example Citrix or Skype) and need only a few team experts.

## Where can I find the Skills Matrix

The 2017 Skills Matrix master copy is held on our team shared drive in

\\sg.datastore.ed.ac.uk\sg\isg\usd\shared\operationalservices\User Support Skills Matrix

Please save a copy of this file to your own filespace and work on it from there. Please do not overwrite the master copy or save your own Skills Matrix to the shares space. Your Skills Matrix should remain confidential.

## What will happen with the information I provide?

Your annual reviewer will review the returns and identify any areas you need to develop, or areas where you have expertise to help others. We will also merge all skills matrix forms and perform a gap analysis. This will tell us if we have enough staff with the correct skills to support all of our services

## What if I have any questions or concerns around filling out the Skills Matrix?

Please speak to xxx.

## Service Desk skills matrix example – Manchester Metropolitan University

The following example includes only email and print related skills, but can be used across your entire service catalogue:

| Skills Matrix              | Person 1<br>(senior advisor) | Person 2<br>(experienced) | Person 3<br>(after probation) | Person 4<br>(new starter) |
|----------------------------|------------------------------|---------------------------|-------------------------------|---------------------------|
| <b>Email</b>               |                              |                           |                               |                           |
| Exchange Staff Email       | 2                            | 2                         | 2                             | 1                         |
| Office 365 Student Email   | 3                            | 3                         | 3                             | 1                         |
| Barracuda & spam filtering | 2                            | 1                         | 0                             | 0                         |
| Email Archive              | 3                            | 2                         | 2                             | 1                         |
| Outlook Email Client       | 2                            | 2                         | 2                             | 1                         |
| Outlook Email Web App      | 3                            | 3                         | 3                             | 1                         |
| Shared Mailbox             | 3                            | 3                         | 3                             | 1                         |
| Bulk Mailer                | 3                            | 0                         | 1                             | 0                         |
| Email Distribution List    | 3                            | 2                         | 3                             | 1                         |
| <b>Print</b>               |                              |                           |                               |                           |
| Print credit               | 3                            | 3                         | 3                             | 1                         |
| Multi-function printer     | 3                            | 3                         | 3                             | 2                         |
| Wide-format printing       | 3                            | 2                         | 2                             | 1                         |
| Mobile print               | 3                            | 3                         | 2                             | 2                         |
| Print kiosks               | 3                            | 3                         | 2                             | 1                         |

- |          |                 |   |
|----------|-----------------|---|
| <b>0</b> | No knowledge    | Can't perform related tasks                         |
| <b>1</b> | Basic awareness | Can perform tasks with help from others             |
| <b>2</b> | Fully trained   | Can perform tasks independently and can help others |
| <b>3</b> | Expert          | Can work proactively & confidently teach others     |

The score is a combination of knowing what the process or service is, how it works and how to support it, including where and how to escalate it.

## IT Service Desk staff satisfaction survey – University of Leeds

### Survey Review Document

**Client:** University of Leeds Information System Services

**Survey:** IT Service Desk Staff Satisfaction

**Start Message:** Staff satisfaction within the team – we would like you all to complete a short survey to help inform us of how satisfied you are at work.

**End Message:** Thank you for taking the time to complete this survey. Once it has been closed the outcomes will be published and any areas of concern will be explored by HR. If you have any questions please contact XXX

| 1. I enjoy my work most days (Multiple Choice, select one only) |       |                            |          |                   |
|---|-------|----------------------------|----------|-------------------|
| Strongly Agree  | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |

| 2. I have a clear understanding of my role responsibilities and what is expected of me? (Multiple Choice, select one only) |       |                            |          |                   |
|--|-------|----------------------------|----------|-------------------|
| Strongly Agree   | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |

| 3. I understand how my work contributes to the University and OneIT objectives (Multiple Choice, select one only) |       |                            |          |                   |
|---|-------|----------------------------|----------|-------------------|
| Strongly Agree  | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |

| 4. I am happy with the career development opportunities available to me (Multiple Choice, select one only) |       |                            |          |                   |
|--|-------|----------------------------|----------|-------------------|
| Strongly Agree   | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |

| 5. My role provides me with challenges and opportunities to learn new things (Multiple Choice, select one only) |       |                            |          |                   |
|---|-------|----------------------------|----------|-------------------|
| Strongly Agree  | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |

| 6. If I perform well I feel I will be recognised for my efforts (Multiple Choice, select one only) |       |                            |          |                   |
|--|-------|----------------------------|----------|-------------------|
| Strongly Agree   | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |

| 7. I feel my contribution is valued and respected by stakeholders (Multiple Choice, select one only) |       |                            |          |                   |
|--|-------|----------------------------|----------|-------------------|
| Strongly Agree   | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |

8. My line manager treats staff fairly (Multiple Choice, select one only)

|                |       |                            |          |                   |
|----------------|-------|----------------------------|----------|-------------------|
| Strongly Agree | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |
|----------------|-------|----------------------------|----------|-------------------|

9. I am told why things happen within my team (Multiple Choice, select one only)

|                |       |                            |          |                   |
|----------------|-------|----------------------------|----------|-------------------|
| Strongly Agree | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |
|----------------|-------|----------------------------|----------|-------------------|

10. I believe my line manager listens to my ideas and views (Multiple Choice, select one only)

|                |       |                            |          |                   |
|----------------|-------|----------------------------|----------|-------------------|
| Strongly Agree | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |
|----------------|-------|----------------------------|----------|-------------------|

11. I believe the Senior Management Team listen to my views and ideas (Multiple Choice, select one only)

|                |       |                            |          |                   |
|----------------|-------|----------------------------|----------|-------------------|
| Strongly Agree | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |
|----------------|-------|----------------------------|----------|-------------------|

12. Customer satisfaction is a priority in my team (Multiple Choice, select one only)

|                |       |                            |          |                   |
|----------------|-------|----------------------------|----------|-------------------|
| Strongly Agree | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |
|----------------|-------|----------------------------|----------|-------------------|

13. There is a strong sense of team work in the Service Desk (Multiple Choice, select one only)

|                |       |                            |          |                   |
|----------------|-------|----------------------------|----------|-------------------|
| Strongly Agree | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |
|----------------|-------|----------------------------|----------|-------------------|

14. There is a strong sense of team work between the Service Desk and other teams within the organisation (Multiple Choice, select one only)

|                |       |                            |          |                   |
|----------------|-------|----------------------------|----------|-------------------|
| Strongly Agree | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |
|----------------|-------|----------------------------|----------|-------------------|

15. I believe that action will be taken to address any issues delivered by this survey (Multiple Choice, select one only)

|                |       |                            |          |                   |
|----------------|-------|----------------------------|----------|-------------------|
| Strongly Agree | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |
|----------------|-------|----------------------------|----------|-------------------|

16. This survey is completely anonymous. Further comments and feedback are welcome (Open Ended)

|  |
|--|
|  |
|--|

**This is IT** **MMU IT Services**  
@MMU\_IT

Kate from our IT Helpline, doing her bit for sustainability! 🌱

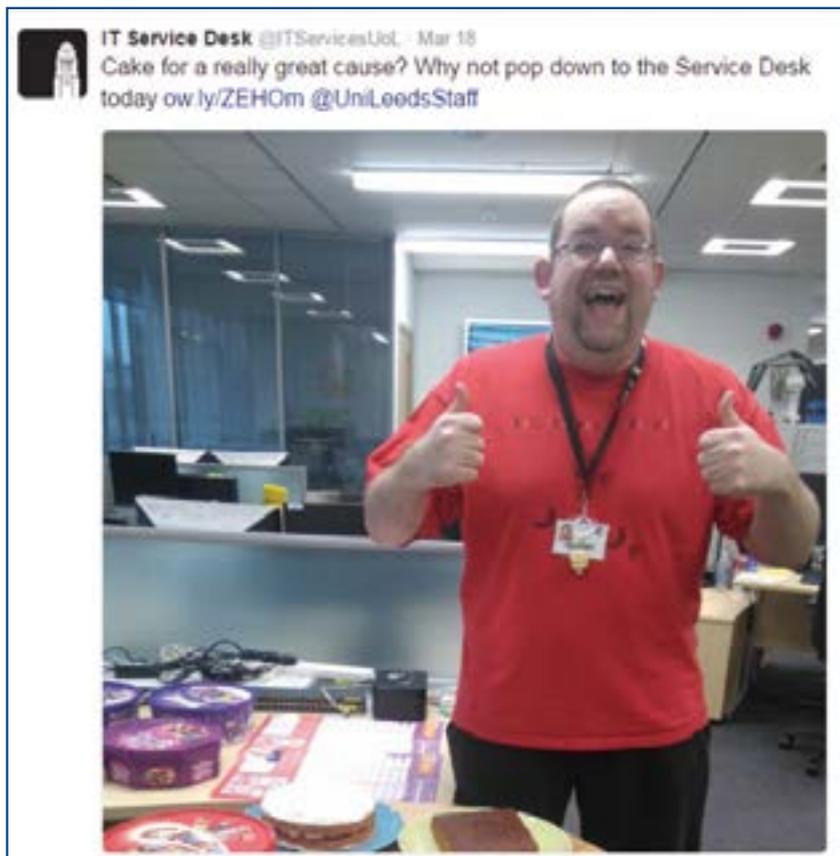
**MMU Environment Team** @MMUEnvironment  
We've got loads going on this month- Carbon Literacy, Pop Swap, Biodiversity Survey & an art show. Check it out: [bit.ly/1XG5l6n](http://bit.ly/1XG5l6n)

RETWEETS 2    LIKES 3

8:15 AM - 28 Apr 2017

↩ 1    ↻ 2    ❤ 3    📄

## Social responsibility – University of Leeds



IT Service Desk @ITServicesUoL

We're supporting the Leeds North West Foodbank. If anybody has any food donations, please bring them to the IT Service Desk @UniLeedsStaff

LEEDS NORTH & WEST FOODBANK  
**HELPING LOCAL PEOPLE IN CRISIS**  
Learn more

7,344 three-day emergency food supplies given to people in crisis in 2013  
2013 the year that our Foodbank opened  
1 IN 5 of the UK population live below the poverty line

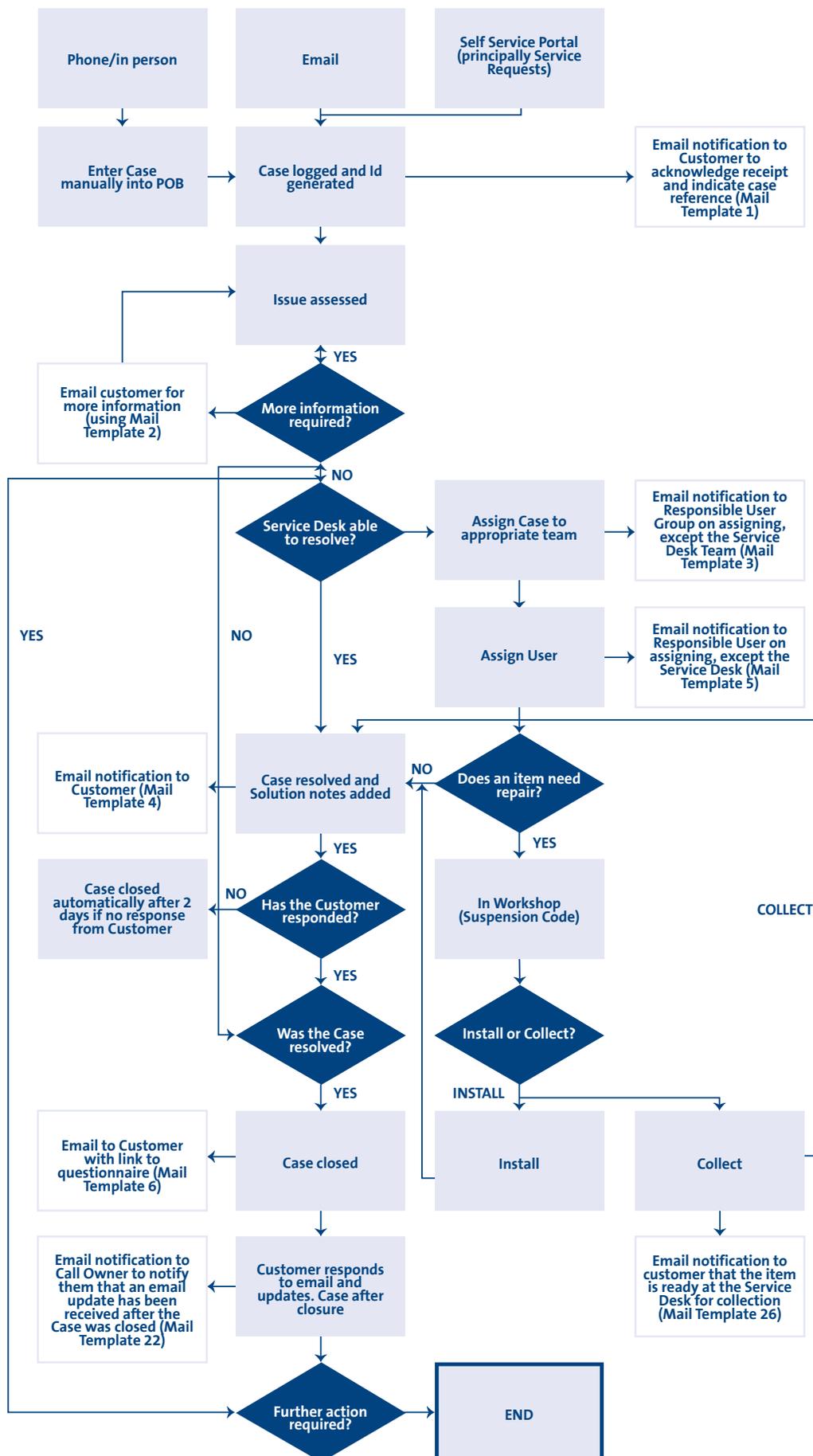
The image is a promotional graphic for the Leeds North & West Foodbank. It features a collage of photos showing people, including a woman in a green jacket, a man in a blue jacket, and a young boy. Below the photos are three statistics: 7,344 three-day emergency food supplies given to people in crisis in 2013; 2013 the year that our Foodbank opened; and 1 IN 5 of the UK population live below the poverty line.

# Resources for Chapter 5 - Processes and procedures

## RESOURCES

- Sample incident management flow
- Service desk opening procedure – University of Bath
- Hazardous waste collection procedure – University of Bath
- Service desk new starter checklist – University of Bath
- Service desk leaver checklist – University of Bath
- Laptop clinic booking process – University of Bath
- Service acceptance criteria – University of Leeds
- Operational support model template – University of Leeds
- Sample service request flow

## Sample Incident management flow



## Service Desk opening procedure – University of Bath

### Opening the student facing helpdesk.

When you are on the Front Desk your responsibility is to deal with staff/students who turn up in person. The Front Desk area includes the main Help Desk, the 3 desks behind and the self help area on the bench opposite the IT Shop.

If you have any changes you'd like made or any questions on the space you can speak with the team leaders.

### Front Desk general duties

Making sure the How-To leaflets are stocked

Keep the front desk tidy and free of clutter

Generally keep the Help Desk area as a whole tidy

Making sure everyone who comes into the Help Desk area is seen to

Giving out and taking back AV equipment

If it is quiet support calls can be answered

First point of contact for visitors who have arranged an AT appointment with Tim Winship

Turn on the TV and display the slides

### Logging calls

It is good practice to ask for the users ID or username when you initially speak to the user. You can also start logging the call straight away. If you are not already logged on to a PC make sure you have a paper sheet TOPdesk call log (X:\Filepath XXX) to log usernames and their queries for later entry.

### Queuing procedure at the main Help Desk

Keep the main Help Desk clear. If you are looking at a laptop or something that might take a bit of time you can transfer to one of the 3 other desks behind the main desk. The next person on the rota can take ownership of the query or fill in on the main Help Desk.

### The leaflet holder area on the self help desk

This can be used by students for self help or for assistance with a mobile device. You can use this desk to keep the main desk free if it is a quick query.

### Help Desks 1,2 & 3

These desks can be used as you would use the main Help Desk, you can login via the ccs hd login and access your desktop/unidesk remotely. This means that you do not need to abandon the student/staff member by having to walk back to your own desk. This will also ensure that the main Help Desk is kept free.

### Laptop/phone/tablet setups

Familiarise yourself with the hand outs we offer. This will tell you the details of connecting to the various services available at the university (printing, VPN, wifi etc).

## Installing software from secure downloads

Students and staff at the university will all have access to the secure downloads area, if they log in to it they will see the software they have access to download and install. This is controlled by what their role is. If their role is 'Other' or external they will have limited access to the software.

## Laptop clinic process - Booking (when to book/how to book/diagnostic procedure)

During busy times if you are dealing with a laptop and it is taking more than 20 mins or so you should book it into the next available Laptop Clinic slot. We need to see the laptop before we book it in to make sure that there is something we can do with it. Any diagnostic processes or actions should be noted on the booking sheet and a call logged in TOPdesk.

## Users picking up Username and passwords from the front desk

Users requesting usernames and passwords for other new members of absent staff will normally come to the Help Desk to sign and collect the details. We need to check their ID and make sure they sign in the book on the persons behalf.

## AV process

The AV pickup and dropoff point is at the Help Desk. For collections we need to ask their name and get the required items from the storeroom on the table. Then we and the collector need to sign the booking sheet (in duplicate). If there are any questions about equipment you can speak to AV for them to check.

Returned equipment needs to be put on the returns shelf on the right of the storeroom. They do not need to sign when returning.

## Sunray card process

Sunray cards, which give webbrowser only access, can be issued from the Help Desk. It is a £10 deposit and they will need to fill in the details on the sheet. When the card is returned we just need acknowledge its return and give back the deposit.

## Shop process

We have a Help Desk till keyfob so we can sell items from the IT Shop if needed. If you have not been till trained please ask before you attempt a sale.

## Personal and University owned equipment

The general rule is that the Service Desk will assist with all personal equipment (laptops, phones, tablets). Any university owned equipment will be dealt with by the departmental IT support team. Phones on the university contract are dealt with by the IT Shop

## Changing the Slides on the Front Television

Usually the front TV will be running a show reel presentation containing general information for users. However, it can be used to display whatever is required should circumstances arise, e.g. service outages, open day presentations, intake show reels, etc. The files are stored on the X drive in the path X:\Filepath\xxx. Using any of the Powerpoint files already present, simply change the information, delete or add slides, and then save a new file. Next, save a new file in a folder within 'TV Presentation Slides' in the format of JPEG (as the TV cannot read Powerpoint files). Finally, save it to the USB stick that's plugged into the TV and then set it to run as a slideshow presentation if you want to run in show reel fashion, or select a single image to remain on the screen.

## Hazardous waste collection – University of Bath

### What is Hazardous Waste and where do we store it?

Currently we store all hazardous waste under the main bench in the laptop clinic area. Any electrical waste such as PCs, laptops, monitors or cables are considered hazardous waste for the purposes of this. We will take in student owned equipment for hazardous waste disposal. There is no need to remove HDD or SSD drives from machines being disposed of, as these will be responsibly destroyed by the company we have contracted to dispose of our waste equipment. Hazardous Waste collections are every Thursday, usually early morning.

Information on how to inform Estates that Hazardous Waste needs to be collected

Usually once we have a number of items ready for collection, send an email to [xxx@lists.bath.ac.uk](mailto:xxx@lists.bath.ac.uk) detailing the amount of waste we have e.g. 1 computer and 2 monitors. We do not need to be too specific about smaller items, e.g a small bundle of cables.

Upon receipt of confirmation, email [xxx@lists.bath.ac.uk](mailto:xxx@lists.bath.ac.uk) informing the group that collection has been organised to be collected on Thursday

If possible, move the items to be collected to a similar location to make it easier to be found and collected

## Service desk new starter checklist – University of Bath

| Name | Date |
|------|------|
|      |      |

### Day 1

#### 1. Introduction to line Manager

Introduce the new starter to their line manager  
Explain the organisation of the service desk and our role within computing services.  
Explain the nature of the role, the current rota and the different tasks relating to front and back desk support (See Common Tasks)

#### 2. Introduction to the team

Introduce the new starter to the other members of the team, notably:  
The other Service Desk Technicians  
The other Service Desk Team leader  
The AV Administrators  
The Support Manager (Service Desk)  
The Service Manager (Service Desk)  
Explanation of the chain of escalation and who and how to ask for help.

#### 3. Tour of the Service Desk

Entrances and Exits (including Emergency Exits and Assembly Points).  
First Aid and First Aiders.  
Their personal workstation and storage (drawers etc.).  
Printer location.  
Location of toilets, washing facilities and tea/coffee making area.

#### 4. Account set up and library card

Providing the new starter has returned their contract to HR, they should be set up on the system. Create their account as usual.  
Visit the library issue desk to obtain a library card.  
Issue the new starter with a lanyard and card protector, and explain the necessity to wear it when out the front.

#### 5. Log into their workstation

Take the new starter to their workstation and make sure they can log in.

#### 6. Parking Permit

If the new starter requires a parking permit, explain the process and help them to apply for a permit.

#### 7. Parking Permit

The Computing Services Director  
The Assistant Director (User Services)  
The Assistant Director (MIS)  
The Assistant Director (IT Infrastructure)  
The Computing Services Admin team

## 8. Organisational Chart

Show the new starter the organisational chart for the department, and explain the various roles of different teams.

## 9. Gather relevant contact details

Send all relevant data that is needed (telephone extension, office details) to Director's PA and xxx@bath.ac.uk so they can update Person Finder and the Computing Services Organisation Chart etc. Contact xxx@bath.ac.uk if they are taking over someone else's phone to ensure that the names are changed over.

## 10. Compulsory Training courses

Complete key e-learning courses:  
Fire Safety: xxx  
Invacuation: xxx  
Information Security: xxx

## 11. Set up Access to Systems

(See Access required for Service Desk Staff)

## 12. Explanation of Flexi-time and Annual leave

Introduce the new starter to Flexi-time, minimum staffing levels and core hours  
Have the new Starter log a ticket to Andy Keen to get a timesheet.  
Explain annual leave booking process and ESS on itrent

## 13. Sickness Policy

Explain the Sickness absence policy.  
X:\Filepath xxx  
How to report a sickness absence (E.g. Phone call to Computing Services reception to open a sickness absence in itrent, then a phone call to their line manager within 30 mins of usual start time.)

## 14. Acceptable use of Computer systems

Explain the acceptable usage of computers and IT equipment on campus, and point them to the documentation:  
<http://www.bath.ac.uk/bucs/aboutbucs/policies-guidelines/policies-acceptable-use.html>

## 15. Introduction to the Wiki

Explain the uses and limitations of the Wiki, and how we use it.  
Point the new starter to the Service Desk Staff User Guides and encourage them to explore the information within:

## 16. Dress code

Explain the uses and limitations of the Wiki, and how we use it.  
Point the new starter to the Service Desk Staff User Guides and encourage them to explore the information within:

## 17. Workstation Assessment

Complete initial Workstation assessment.  
If the user has any disabilities/AT requirements contact the AT Supporter for a meeting and assessment.

## Week 1

### 1. Start of Probation+ Meeting with line Manager

Agree probation objectives, set targets and agree development needs (see: X:\Filepath xxx)

### 2. IT Training Website and Staff development site

Point the new starter at these two sites and encourage them to view the available courses:  
<http://www.bath.ac.uk/bucs/services/ittraining/>  
<http://www.bath.ac.uk/hr/learning/>

### 3. Book a place on Introduction to the University of Bath Course

<http://www.bath.ac.uk/hr/learning/programmes/courses/intro/index/>

### 4. Compulsory Training courses

Go through the list of compulsory training courses and complete as many of the E-Learning courses as possible within the first week. Compulsory training courses can be found here:  
X:\Filepath\XX  
Including Customer Care course (20th June 2016)

### 5. Health and Safety Briefing

Organise a meeting with NAME xxx xxx to go over Health and Safety

### 6. Begin shadowing Buddy

With a view to specific Service Desk duties

## Month 1

### 1. Compulsory Training courses

Complete all Compulsory E-learning Modules  
Line manager to book new starter onto all available instructor-led training courses.

### 2. Begin ITIL training if not already qualified

### 3. Workstation assessment

Review earlier workstation assessment and ensure that workstation area is still suitable and no issues have been identified.

## Month 3

### 1. Mid Probation+ Meeting with line Manager

Discussion and evaluation of Probation progress, re-examination of Probation Objectives and identification of any further

## Month 6

### 1. End of Probation+ Meeting with line Manager

Agree probation objectives, set targets and agree development needs (see: X:\Filepath xxx)

## Ongoing

## Service desk leaver checklist – University of Bath

| Name | Date |
|------|------|
|      |      |

### Prior to the leave date

#### 1. Discussion with line Manager

The leaver needs to discuss their intent to leave with their line manager, usually in a 1-1 or equivalent meeting. The line manager will need to ascertain the reason for leaving. The leaver needs to check what notice they are contractually required to give (Usually 1 month) and agree a leave date with their Line manager.

#### 2. Confirm in writing to Line Manager and HR administrator

The leaver will need to confirm their intentions and the agreed leave date to their line manager and HR administrator in writing (an up to date list can be found here: <http://www.bath.ac.uk/hr/calculators/hr-department-names/Index.htm>)

#### 3. Check Address in ESS

The leaver will need to check their home address and update if necessary in their Employee Self Service as their P45 will be sent there.

#### 4. Take copies of Payslips in ESS

The leaver will need to download and print copies of their e-payslips from ESS as they will lose access after they leave.

### On the leaving day

#### 1. Complete Exit Questionnaire

The leaver will need to complete the exit questionnaire found here: <https://bathreg.onlinesurveys.ac.uk/exit>

#### 2. Return any university property to line manager

This includes any Laptops/Tablets/Phones or any items of clothing.

### 3. Re-allocate any open tickets

The leaver will need to make sure they have no tickets left in their name, either by re-allocating or resolving where appropriate.

### 4. Clean out Desk Drawers and workspace

The Leaver will need to clean out their workspace and anything they have in their desk drawers before they go.

### 5. Hand in Library card

The leaver will need to hand in their library card into the library admin desk before they go.

## After employee has left

### 1. Remove leaver's access from all Systems

A full list of systems the leaver needs access removed from can be found here:  
X:\Filepath\xxx.docx

### 2. Rebuild leavers desktop PC

The leaver's desktop PC will need to be wiped and re-imaged to allow for a clean start for their replacement. The line manager will need to arrange this with the Professional Services Supporters via a ticket.

## Laptop clinic booking process – University of Bath

### Booking in a laptop / PC to the clinic

People will walk in with various laptop issues that cannot be resolved in a short space of time. On these occasions, the device will need to be booked in to a Laptop Clinic, which run Monday - Thursday with 2 bookable slots a day. The process from booking a device through to completing work on it can be broken down into three phases.

**Note: Before carrying out any work confirm with the user that no warranty plan is currently in place. In some cases it may be best to advise the user to direct their issue to the manufacturer or whoever the warranty agreement is with.**

#### One - Booking a device in to a Laptop Clinic

Having assessed that the issue with a device is not a quick fix but, given more time, could be repaired, it should be booked into a Laptop Clinic. Follow these steps when doing this:

Check the Laptop Clinic folder (located at the front desk) to see when the next available slot is and record the users username in the space provided. Note - only two laptops should be booked in for each day

Get the user to fill out a Laptop Clinic Booking form, Note - when re-installing an OS make the customer aware that all applications will be removed and only data will be backed up if the correct box is ticked.

Create a ticket for the booking in TOPdesk, setting the status to 'Awaiting Customer', and send out a notification to the user confirming the slot has been reserved for them (a standard solution under Mobile Devices -> Laptop Clinic)

Write the ticket number in the space provided at the top of page three of the completed booking form

File the booking form in the Laptop Clinic folder on the date that the user has requested

#### Two - Working on the laptop

Below are the steps that should be followed when the laptop is handed in to be worked on in a Laptop Clinic:

Retrieve the users booking form from the Laptop Clinic folder and ensure everything has been filled out correctly e.g. password provided, a bag or power supply dropped off, etc.

Label ALL items that are dropped off with the labels in the laptop folder.

Open the ticket in TOPdesk, assign it to yourself and keep the status to 'Awaiting Customer' the keep the ticket in a 'frozen' state while work is carried out

Log ALL the work that is carried out on the laptop booking form, recording only the time actually spent performing tasks. For example, if you set a malware scan running, only record the time spent launching the program, not how long the scan took to complete

#### Three - Completing the work

Once work has been completed, the following needs to be done:

Scan the completed laptop booking form

Open the TOPdesk ticket and do the following:

attach the scan of the completed booking form

add the total amount of time spent working on the device

set the ticket to 'Resolved'

send out a notification to the user that their laptop/PC is ready for collection

Place the device on the upper shelf in the Laptop Clinic work area along with the booking form and anything else the user handed in

When the user comes to collect their laptop, check their username before giving out the device

**Note: You must ALWAYS check users ID when they come to collect their laptop/external drive from the Service Desk. If someone would like someone else to collect their device on their behalf, full details of the person must be provided.**

## Service acceptance criteria – University of Leeds

|   |   | Signed off | Date |
|---|---|------------|------|
| A | Go Live Date agreed with all parties (business, PM, operational support teams)                                      |            |      |
| B | Early Life Support Model timeframes and plans agreed and communicated, documented and accepted                      |            |      |
| C | Roles and Responsibilities understand and agreed, including Service Owner and Business Owner (RACI)                 |            |      |
| D | Technical Specification documented, including architecture, interfaces, security and compliance                     |            |      |
| E | Test Plans completed successfully and results reviewed and accepted   |            |      |
| F | Operational Support Model Including all ITSM processes, agreed, documented, tested and accepted                     |            |      |
| G | OLA and SLA agreed, documented and accepted by all relevant parties   |            |      |
| H | All OLA (or SLA) targets can be monitored measured, reported and reviewed   |            |      |
| I | Users, support staff and technical staff have received appropriate training   |            |      |
| J | User, support staff and technical staff have received appropriate documentation that has been reviewed and accepted |            |      |
| K | Operational workload and component costs identified and approved and built into financial plans                     |            |      |
| L | All CIs identified and entered in the Configuration or Asset Management System                                      |            |      |
| M | All Operational Risks assessed and mitigating actions completed   |            |      |
| N | A log of any outstanding project issues including planned mitigation  |            |      |
| O | Contingency and failover measures successfully tested and added to overall resilience test schedule                 |            |      |

## Operational support model template – Leeds Beckett University

### Leeds Beckett University

This document outlines the requirements to manage [insert name of service here] and its components in the operational environment and should be developed based on business requirement

| Operational Support Model Template |  |
|------------------------------------|--|
| Name of Supported Service          |  |
| Business Service Owner             |  |
| IT Service Delivery Owner          |  |
| Project Manager                    |  |
| Service Description                |  |

### Objective

Ensure that an agreed and sustainable operational support model is in place before the service is accepted into the live environment. The model will be reviewed annually and changes to the service will be recorded and managed through a change management process.

### Customers & Users

A description of who will use the service (end users), how many there are and how and when they will use the service.

## Support

### Service Support Hours

The hours that the users can expect support to be available. Identify any differences between the availability

### Early Life Support

Specific information if different from BAU support

### 1st Level Support

Details of who will provide 1st level support for end users, this should include information about contact methods and support levels i.e. call routing/filtering, initial investigation and diagnosis

### Self Help/Training

Details of online self-help, support documentation, FAQs or training materials including who is responsible for producing and maintaining self help

### 2nd Level Support

Details of who will provide 2nd level support including customer/user support as well as technical management e.g. servers/infrastructure, backups, event monitoring, application management

### 3rd Level Support

## Communication

### Business Relationship Management

### Service Management process

Incident Management

Problem Management

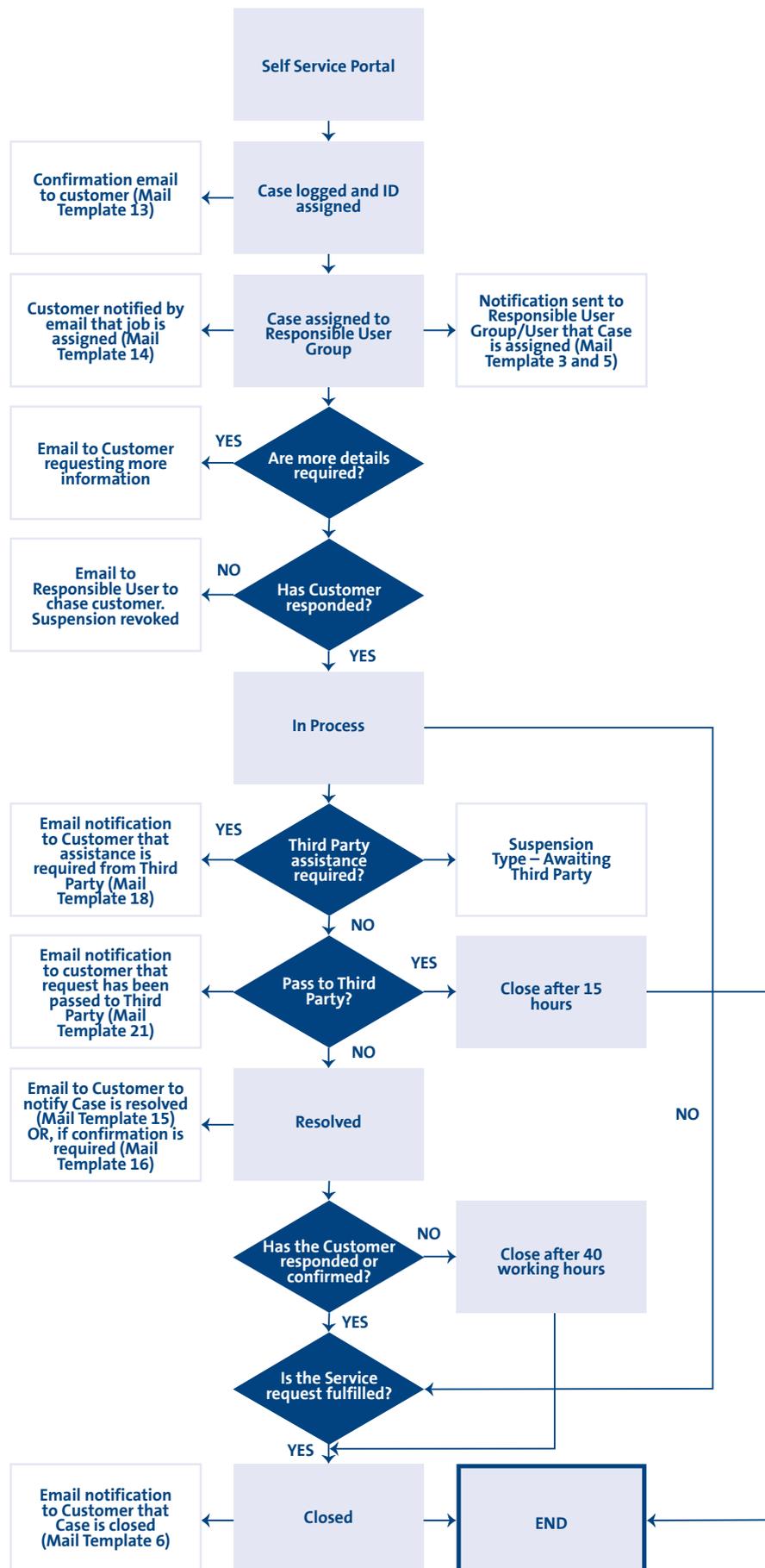
Availability Management

Change Management

## Governance

## Appendices

## Sample service request flow



# Resources for Chapter 6 - Tools and technologies

## RESOURCES

- [IT Service Management Systems in use across higher education – UCISA Corporate Information Systems Survey 2016](#)

## IT Service Management Systems in use across higher education – UCISA Corporate Information Systems Survey 2016

The UCISA Corporate Information Systems special interest group conducts a survey each year, which is a simple snapshot of the core corporate information systems in use by UCISA members:

[www.ucisa.ac.uk/bestpractice/surveys/cis](http://www.ucisa.ac.uk/bestpractice/surveys/cis)

In 2016, 117 institutions responded to question asking which ITSM they used. The results highlighted the wide variety of systems that are available. Hornbill – Supportworks is the most popular and was in use at seventeen (14.5%) responding institutions, followed by LANDesk and Service Now (each with 11 respondents, 9.4%) and TOPdesk (8 respondents, 6.8%). Overall, six respondents indicated that an 'other' IT Service Management System was in use at their institution and these include RemedyForce and PoB. Several systems (Dell KACE, HEAT, House on the Hill, ICCM Assure, iTop, Kayako Fusion, ManageEngine ServiceDesk Plus, Richmond SupportDesk, Tribal and VMware Service Manager) were each selected by just one respondent.

Of the 115 respondents who answered the survey question about method of delivery of IT Service Management Systems 71% of respondents indicated that the IT Service Management System was delivered in-house at their institution in 2016, with a further 27% indicating that it was delivered as software as a service. 2% were a hybrid.

# Resources for Chapter 7 - Performance metrics

## RESOURCES

- [Helpline Objectives - University of Edinburgh](#)
- [IT Service Desk CSFs and KPIs- University of Leeds](#)

# IS Helpline Objectives



THE UNIVERSITY  
of EDINBURGH

## Our Vision

*Striving for Service Desk Excellence at the heart of the University of Edinburgh*

## Our Mission

*To deliver IT and Library help and support to continually improve the user experience, enabling the goals of Information Services at the University of Edinburgh*

■ Our Critical Success factors

■ Our KPIs & Goals

|   |   |  |  |  |
|---|---|--|--|--|
| <p>We will provide support to our users at the point they need it</p> <ul style="list-style-type: none"> <li>- Resolve 90% of calls at first contact</li> <li>- Make initial response to calls in less than 3 hours</li> <li>- Close more than 70% of calls in 1 day</li> <li>- Achieve 80% or greater satisfaction survey response on call answer rates</li> </ul> | <p>We will deliver an excellent customer service.</p> <ul style="list-style-type: none"> <li>- Achieve overall customer satisfaction rates of 80%</li> <li>- Receive less than 10 complaints per quarter</li> </ul>   | <p>We will deliver our services as efficiently as possible</p> <ul style="list-style-type: none"> <li>- Resolve more than 60% of calls at first time</li> <li>- We will answer all telephone calls in 30 seconds or less</li> <li>- We will have less than 5% of all calls re-opened</li> </ul>  | <p>We will help IS develop and deliver the services the users need</p> <ul style="list-style-type: none"> <li>- We will have representation on all IS Technical projects impacting on user facing services.</li> <li>- We will have representation on all relevant committees and boards</li> <li>- We will have quarterly meetings with other IS technical divisions (IT, LTW, Apps)</li> </ul>   | <p>We will act as the users' partner within IS</p> <ul style="list-style-type: none"> <li>- We will hold quarterly liaison meetings with all relevant school IT departments</li> <li>- We will meet with IT Consultancy quarterly</li> </ul>   |
| <p>We are always improving quality of service.</p> <ul style="list-style-type: none"> <li>- We will hold monthly Service Improvement meetings and detail all changes in our Continual Service Improvement Register</li> <li>- We will produce an annual report detailing service improvements and the staff involved in suggesting and delivering them.</li> </ul>  | <p>We will develop staff through training, support and exposure to all aspects of IS work.</p> <ul style="list-style-type: none"> <li>- All IS Helpline staff will complete a Skills Matrix annually</li> <li>- All staff will receive an Annual Development Review</li> <li>- All staff will receive a regular 1 to 1</li> <li>- We will ensure staff complete more than 80% of all required training and development</li> </ul> | <p>We will ensure knowledge is recorded and shared within the team and that all support staff are aware how to find it.</p> <ul style="list-style-type: none"> <li>- A dedicated knowledge management (K-Flow) group will meet at least 4 times per year</li> <li>- All Knowledge sources will be reviewed and updated regularly (no less than once a year)</li> </ul> | <p>We will ensure self help knowledge is available to our user community in a format they can find and use.</p> <ul style="list-style-type: none"> <li>- We will have at least 4 staff in the team trained on website publishing.</li> <li>- We will monitor the usage of self pages and hold a monthly meeting to review figures</li> <li>- We will seek user feedback on the quality of our self help at least once a year.</li> </ul> | <p>We will ensure users get timely and relevant information about the status of IS services.</p> <ul style="list-style-type: none"> <li>- Dedicated Helpline Publisher role - full time publisher role operates at all times</li> <li>- Evening and weekend staff have been trained to identify and handle outage communications and major incident processes</li> </ul> |





# Resources for Chapter 8 - Customer engagement

## RESOURCES

- [Service desk feedback form – University of Leeds](#)

## Service desk feedback form - University of Leeds

### Survey Review Document

**Client:** University of Leeds Information System Services

**Survey:** IT Service Desk Updated

**Survey Created:**

**Survey Changed:**

**Start Message:** Please take a moment to fill in this short survey. Your feedback will be used to improve our services.

**End Message:** Thank you so much!

1. Do you feel your initial contact was dealt with quickly? (Multiple Choice, select one only)

|     |    |
|-----|----|
| YES | NO |
|-----|----|

2. How well do the following phrases describe your experience (Tabular, select one only)

|                |       |                            |          |                   |
|----------------|-------|----------------------------|----------|-------------------|
| Strongly Agree | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |
|----------------|-------|----------------------------|----------|-------------------|

3. The IT Support Advisor was polite and friendly (Multiple Choice, select one only)

|                |       |                            |          |                   |
|----------------|-------|----------------------------|----------|-------------------|
| Strongly Agree | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |
|----------------|-------|----------------------------|----------|-------------------|

4. The IT Support Advisor explained things clearly (Multiple Choice, select one only)

|                |       |                            |          |                   |
|----------------|-------|----------------------------|----------|-------------------|
| Strongly Agree | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |
|----------------|-------|----------------------------|----------|-------------------|

5. My request/incident was resolved in the time expected (Multiple Choice, select one only)

|                |       |                            |          |                   |
|----------------|-------|----------------------------|----------|-------------------|
| Strongly Agree | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |
|----------------|-------|----------------------------|----------|-------------------|

6. My experience was a positive one (Multiple Choice, select one only)

|                |       |                            |          |                   |
|----------------|-------|----------------------------|----------|-------------------|
| Strongly Agree | Agree | Neither agree nor disagree | Disagree | Strongly Disagree |
|----------------|-------|----------------------------|----------|-------------------|

| 7. Overall, how would you rate the service you received out of 5? (1 for Very poor and 5 for Very good)<br>(Multiple Choice, select one only) |              |
|---|--------------|
| 1   | Route to: Q8 |
| 2   | Route to: Q8 |
| 3   | Route to: Q7 |
| 4   | Route to: Q7 |
| 5   | Route to: Q7 |

| 8. We are very happy that you have had a positive experience with us today. Please, could you leave us your feedback on your experience today? (Open Ended) |              |
|---|--------------|
|   | Route to: Q9 |

| 9. We are very sorry that you have had a negative experience with us today. Please, could you leave us your feedback so that we can improve our service? |              |
|--|--------------|
|  | Route to: Q9 |

| 10. Are you (Multiple Choice, select one only) |         |       |
|--|---------|-------|
| Staff  | Student | Other |

| 11. If you would like to provide your name, username and email address, your contact details will only be used to respond to your feedback. (Open Ended) |               |
|--|---------------|
|  | Route to: End |

| 12. Would you like to be contacted regarding your feedback on this occasion? (Multiple Choice, select one only) |    |
|---|----|
| YES   | NO |



# Resources for Chapter 9 - Quality assurance

## RESOURCES

- [DIRFT – Do It Right First Time – Manchester Metropolitan University](#)

## **DIRFT - Do It Right First Time - Manchester Metropolitan University**

This concept is important because it ensures accuracy and efficiency in the service that we provide, preventing re-work, and duplication of effort. By minimising the amount of time our customers and colleagues spend on gathering information and troubleshooting, we are maximising the amount of time they can spend on valuable projects and initiatives.

### **Information we always request from the customer**

- ID number
- Location
- Contact details
- Description of issue including any relevant error messages
- Relevant asset numbers

### **Information we capture when logging cases**

- Description
- Customer details incl. correspondence email (if different from University email address)
- Case type and logging category
- Case / symptom notes
- Impact (for incidents) or deadline (for requests)
- Case location
- Asset number
- Responsible user group (team)
- Case status

### **Our descriptions and notes should always:**

- Fully describe the incident or request, including screenshots of error messages
- Include notes of any troubleshooting steps taken
- Include notes of the answers to any questions that have been asked from the customer
- Include a note of every interaction with the customer (email or phone call)

**Our descriptions and notes should never:**

- Contain emotionally charged or derogatory comments
- Be written in a way that only the call logger will understand

**Our solution notes should always:**

- Be written from the customer's perspective and be customer friendly
- Be concise, informative and factual

**Our solution notes should never:**

- Contain long instructions on what the customer needs to do in order to complete the resolution of their case (complex instructions are to be given out prior to resolving the case, in a separate email)
- Be directly copy-pasted from the case notes

**Tip:**

You can treat the symptom notes like a diary, making sure to update it when anything changes, with any new details received, when you contact the customer or any other person in relation to the case. The symptom notes need to contain enough information to do three things:

- For another member of the team to be able to pick up the case if you are unavailable
- For the relevant team to be able to pick up the case and start 2nd or 3rd line support without having to go back to the customer to gather basic information
- To serve as a record in case there is any future requirement to look back at the case, for example if a formal complaint is raised by the customer



# Resources for Chapter 10 - Communication and marketing

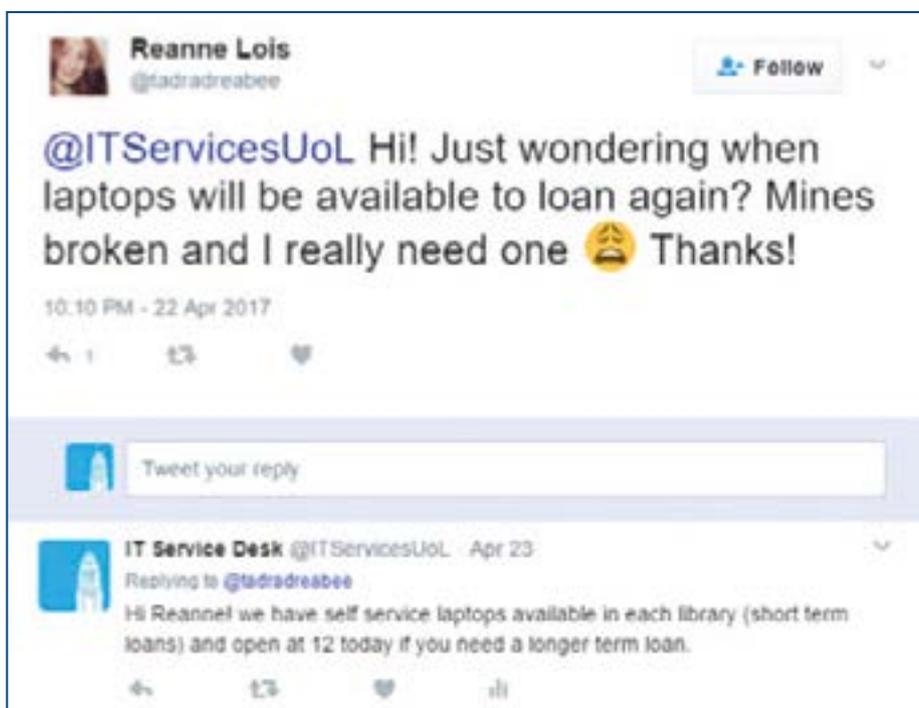
## RESOURCES

- [Using Twitter - Manchester Metropolitan University](#)
- [Using Twitter – University of Leeds](#)
- [IT User Services communications road map – University of Leeds](#)
- [Using social media - Manchester Metropolitan University](#)

## Using Twitter – Manchester Metropolitan University



## Using Twitter – University of Leeds



## IT User Services communications road map – University of Leeds

### Weeks 1-2 (Jul)

|   |
|---|
| <b>1. Customer Satisfaction</b>   |
| Our customer satisfaction score in June was 92% and we received 350 responses <a href="http://ow.ly/P8Zhs">http://ow.ly/P8Zhs</a> (Mon, Tues, Weds)   |
| <b>2. Windows 10</b>  |
| Been hearing about Windows 10 and a free upgrade? Here's some questions answered - <a href="http://ow.ly/Pulc2">http://ow.ly/Pulc2</a> (Mon, Thurs)   |
| <b>3. Cluster Information</b>   |
| Find out about information about all our computer clusters here: <a href="http://ow.ly/PuIg4">http://ow.ly/PuIg4</a> (Mon, Weds, Thurs, Fri)  |
| <b>4. Top Tech Tips</b>   |
| Here are some top tech tips for your computer: <a href="http://ow.ly/Pulmo">http://ow.ly/Pulmo</a> (Tues, Weds, Sat)  |
| <b>5. New Office</b>  |
| Here are some top tech tips for your computer: <a href="http://ow.ly/Pulmo">http://ow.ly/Pulmo</a> (Tues, Weds, Sat)  |
| <b>6. O365 Login</b>  |
| When logging into the new e-mail ( <a href="mailto:office365.leeds.ac.uk">office365.leeds.ac.uk</a> ), please use your: <a href="mailto:username@leeds.ac.uk">username@leeds.ac.uk</a> (Weds, Thurs, Fri) |
| <b>7. O365 Benefits</b>   |
| With Office 365, you get free Email with a 50GB quota, Microsoft Office and 1TB of OneDrive cloud storage (Thurs, Fri, Sun)   |
| <b>8. Status Page</b>   |
| Bookmark our status page for quick information about all IT services: <a href="http://it.leeds.ac.uk/status">http://it.leeds.ac.uk/status</a> (Thurs, Sat, Sun)   |
| <b>9. Password Security</b>   |
| Please remember that we will never ask you for your password, either over the phone or in an e-mail. (Fri, Sat)   |

### Weeks 3-4 (Jul)

|   |
|---|
| <b>1. Opening Hours</b>   |
| We're currently open Summer Hours which are 8am-5pm weekdays. We will respond to weekend e-mails ASAP on Monday (Sun, |
| <b>2. Status Page</b>   |
| Quickly check our status page 24/7 here: <a href="http://it.leeds.ac.uk/status">http://it.leeds.ac.uk/status</a>      |

|   |
|---|
| 3. Graduation   |
| Congratulations to all our students who have graduated this year. This is what you need to know: <a href="http://goo.gl/Y7kjdI">http://goo.gl/Y7kjdI</a>      |
| 4. Free Office  |
| Don't forget, you can get up to five free installs of Microsoft Office as a student and staff member: <a href="http://goo.gl/kw2AeT">http://goo.gl/kw2AeT</a> |
| 5. Desktop Anywhere   |
| Fed up with the rainy weather - why not work from home? Bring on Desktop Anywhere - <a href="http://ow.ly/Q75oE">http://ow.ly/Q75oE</a>                       |
| 6. New E-mail Guides  |
| Check out our new guides for setting up email. Let us know what you think - <a href="http://ow.ly/Q2fZE">http://ow.ly/Q2fZE</a>                               |
| 7. The IT Shop  |
| You can buy software such as SPSS and ArcGIS for personal use from: <a href="http://store.leeds.ac.uk">store.leeds.ac.uk</a>                                  |
| 8. Opening Hours  |
| We are currently open 8am-5pm weekdays. Please get in touch - <a href="http://ow.ly/Q75Tz">http://ow.ly/Q75Tz</a>   |
| 9. IT Website   |
| For help and support online 24/7, visit: <a href="http://it.leeds.ac.uk">it.leeds.ac.uk</a>   |
| 10. Free Office   |
| Get your free copy of Microsoft Office (on up to 5 devices) from: <a href="http://office365.leeds.ac.uk">office365.leeds.ac.uk</a>                            |
| 11. Video Leeds   |
| Here's how you can publish recordings to the new VideoLeeds - <a href="http://ow.ly/Q7eYG">http://ow.ly/Q7eYG</a>   |
| 12. Desktop Anywhere  |
| Working from home? Use Desktop Anywhere to access all of your files on the M and N Drives: <a href="http://ow.ly/Q75wn">http://ow.ly/Q75wn</a>                |

### Featured Topics (Jul)

- Graduation
- Summer Opening Hours
- Video Leeds
- Retrive Initial Password
- Office 365 Upgrade

### Featured Topics (Aug)

- Get your email on multiple devices
- Free Microsoft Office
- Get connected to Wi-Fi
- Summer Opening Hours
- Students - Retrive your initial password

## Using social media - Manchester Metropolitan University

### Guidelines for @MMU\_IT

Social media is a highly effective communications tool, which, when used appropriately can reach a wide customer base. More general social media guidance is available from the wider University:

- <https://www2.mmu.ac.uk/humanresources/a-z/guidance-procedures-handbooks/guidance-on-the-acceptable-use-of-social-media/>

Our social media channel is primarily used as a 'news-out' forum, pushing information and updates about service disruptions and planned outages. It is also a key channel for marketing new services to our staff and student customers.

### We need to be mindful that social media is a publically accessible channel, and adhere to these University wide rules:

- Protect confidentiality, privacy and security
- Safeguard university assets
- Don't post any material that is obscene, defamatory, profane, libellous, threatening, harassing, abusive, hateful, or embarrassing to another person or entity
- Content must be focused on IT
- Comply with copyright
- Attribute any content that is not ours
- Be wary of what we like, follow, retweet etc. as this can be viewed as an endorsement

### Day to day usage

- Use social media to keep our customers informed of any planned downtime, or upgrades, which will affect access to systems
- Only post about changes with planned downtime longer than 5 minutes
- Don't post about changes which may only result in services being 'at risk'
- Post a minimum of three tweets when there is scheduled downtime longer than 5 mins:
  - At least three days before the outage
  - The day before
  - At the start of the outage (note the length of outage if 5 mins – 30 mins)
  - When the service is available again (for outages over 30 mins)
- Content on the feed should be roughly divided between service notifications, promotion of our products, services and technologies and external content curation
- Sources of information to be posted should include:
  - Change Advisory Board
  - Project Office
  - Customer Engagement Manager
  - Other university news and events (tech related)

## General principles:

- Conversational
- Succinct
- Accurate
- If in doubt don't post
- Use common sense
- Public information

## Crisis communications

- During all Major Incidents our Twitter account should be used to update our broad, generic audience - this will give snippets of updates and advice on any workarounds, progress and so on
- During a service outage a tweet referencing the incident should be pinned to the top of our feed for added visibility
- The tone and style of tweets should be factual and use positive, supporting imagery to convey the human side of events to our customers
- Encourage other University accounts to retweet our messages, and send direct message to those accounts whose key users are most affected by any outages
- Measurement
- Brief monthly reports are required to keep track of the following metrics, these can be pulled out from <https://analytics.twitter.com>.
- Tweets
- Tweet impressions
- Profile visits
- Mentions
- New followers

## Risks

- Possibility of Twitter becoming a front line support service - this risk needs to be managed by reminding customers that all incidents and requests must be submitted through the service desk, either by phone or email



# 14 Copyright, disclaimer and availability

## Copyright

This publication is licensed under the Creative Commons Attribution-NonCommercial 4.0 International licence. Subject to the source being appropriately acknowledged and the licence terms preserved, it may be copied in whole or in part and incorporated into another document or shared as part of information given, except for use for commercial gain.

The publication also contains resources from institutions; where this material is copied or otherwise reused, both UCISA and the institution concerned should be acknowledged.

## Disclaimer

The information contained herein is believed to be correct at the time of issue, but no liability can be accepted for any inaccuracies. The reader is reminded that changes may have taken place since issue, particularly in rapidly changing areas, such as internet addressing, and consequently URLs and email addresses should be used with caution. UCISA cannot accept any responsibility for any loss or damage resulting from the use of the material contained herein.

## Availability

The UK Higher Education Service Desk Toolkit is freely available to download for non-commercial use from [www.ucisa.ac.uk](http://www.ucisa.ac.uk)





Universities and Colleges  
Information Systems Association

University of Oxford  
13 Banbury Road  
Oxford OX2 6NN

Tel: +44 (0)1865 283425  
Fax: +44 (0)1865 283426  
Email: [admin@ucisa.ac.uk](mailto:admin@ucisa.ac.uk)  
[www.ucisa.ac.uk](http://www.ucisa.ac.uk)