

Case Study: Northern Sydney Institute

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Executive Summary

This case study examines customer self service within the NSW, Northern Sydney Region, TAFE Institute. As a Service Desk with no inbound phone number, the only means for customers to log a call is via a web based *self-service* form. How this was achieved, what were the drivers and has it succeeded?

Background

The NSW Department of Education and Training (DET) delivers high quality education and training services from early childhood education through to post-compulsory education and training to meet the needs of more than 1.25 million students. DET issues over 140,000 group certificates annually to a workforce of predominately teachers, public servants and ancillary staff. This equates to 95,000 full-time equivalent employees. DET is the largest single organisation, public or private, in Australia. With a recurrent budget of around \$10 billion and an asset base of about \$17 billion, DET is responsible for almost one quarter of the State's total recurrent budget.

DET is made up of ten regions which divide the state into self managed networks. The regions are supported by a shared corporate service which includes Finance & Administration, Human Resources, Infrastructure & Assets, and Information & Communications Technology.

TAFE NSW is an entity within DET which delivers vocational education and training (VET) to around 500,000 students throughout some 131 colleges organised into the regions. TAFE NSW has a recurrent budget of around \$1.5 billion and an asset base of some \$2.6 billion.

One of the ten regions "Northern Sydney" is typically made up of a TAFE Institute and Schools. Northern Sydney schools service over 80,000 students who attend 170 schools in the area extending from Sydney Harbour in the south to the Hawkesbury in the north; from the Pacific Ocean in the east to Meadowbank, Castle Hill, Dural, Annangrove and Kenthurst in the west and north-west.

Northern Sydney Institute of TAFE (NSI) is a Quality Endorsed Training Organisation certified under ISO 9001:2000 international standards. In 2003 NSI became only the second TAFE institute in Australia to achieve ISO 14001 (Environmental Management Systems) certification.

NSI represents around 12% of the total effort for TAFE NSW. The Institute offers over 1,000 courses to more than 50,000 local and international students annually. These courses are delivered at colleges based at Bradfield, Crows Nest, Hornsby, Meadowbank, North Sydney, Northern Beaches and Ryde. Off-shore operations include partner colleges in Bangkok, Shanghai, Schenzhen and Songjiang. In all, 2,700 full-time and part-time staff deliver close to 13 million student hours per year. The Institute has an annual budget of more than \$130 million and an asset base of around \$370 million.

NSI has over 130 specialist and standard IT classrooms which have a minimum of 16 desktops in each. In addition there are as many non-standard classrooms or speciality facilities such as libraries. NSI facilities are in use from 8:00am to 10:00pm weekdays and most weekends. To allow 24 x 7 portal access most systems are kept up 99.9%. In all, over 4,200 desktops/laptops with over 100 servers and countless printers and peripheral devices make up the IT fleet in NSI. 1,500 of the desktops/laptops are designated to teaching and admin staff which are also heavily utilised.

Case Study

So how does NSI provide Service Desk support for such a large, highly demanding, organisation? Simple, it does not have one! At least not in a traditional sense of a phone number for clients to call. NSI is the *ONLY* institute in NSW which *DOES NOT HAVE* a help desk, in that there are no people on the end of a phone to vet, diagnose, log, resolve where possible and assign incidents. Yes, NSI relies solely on the client logging their own incidents via a web interface to the service desk application. The astounding thing is that this "no phone" policy has been in place for several years. The culture of self service is entrenched.

The scenarios that created this environment were vexed, the most critical were:-

- Our clients, mainly teachers, are on deck for many hours a day, way beyond the capacity to staff a help desk phone line for 14 hours a day.
- Access to networked PCs and therefore the web are plentiful (if yours is broken the one next door is probably OK)
- ICT Support staff are disbursed across the seven colleges. Management at the time believed it was a negative to reduce their “hands on” capacity in order to take phone calls.
- The clients’ IT skills were deemed to be “mature” therefore peer support was encouraged.
- Internal restructures had forced cuts to ICT support staff therefore providing drivers for this rationalisation.
- Support organisations today face many similar business challenges as they strive to effectively service their internal and external customers, regardless of their size or industry. In the face of these challenges, customer service managers may find themselves searching for new technology to address their customer service initiatives.

Business Challenge for NSI

The Service Desk was/is under constant pressure to reduce costs and improve service delivered to end users. Many of the calls to the service desk were not critical in nature, but requests such as password re-sets and account access, limited our support staff’s ability to focus on critical incidents and restore vital services to the business.

Business Need

- Provide end users *self-service* for more than just service desk incidents
- Reduce the time and cost associated with phone support
- Empower end users to enter and check all types of requests
- Enable end users to resolve incidents on their own.

Our Solution

An “in-house” help desk application built using ‘Cold Fusion’ software was implemented about 10 years ago. End users could submit, track and re-open incidents. End users can access frequently asked questions (FAQs) to resolve issues on their own, albeit on a separate web page to the help desk.

Key Features & Benefits

- Reduces the cost of support by offering *self-service* capabilities to end users
- Improves end user experience
- Improves the value of support staff by freeing up their time to pursue strategic initiatives
- Reduces call volume by extending knowledge management to end users

Discussion

So what does all this mean? Has NSI got it right? Can others learn from NSI’s lessons and mistakes?

Self-service is emerging as a tool of choice for consumers and organisations alike. Increasing numbers of people are now selecting *self-service* options, such as Interactive Voice Response (IVR), e-mail, Web, and chat, as their primary means of contact with organisations providing services, and a greater number of forward-thinking organisations are increasing the emphasis they place on *self-service* and adopting additional customer contact channels. Organisations that are not at the forefront of *self-service* processes and technologies are, at best, missing opportunities for greater cost savings and improved customer satisfaction. So why did NSI choose to reduce their channels of communication by removing the phone?

The number of Internet users has grown to 700 million and still expanding at a phenomenal rate. The demand of *self-service* portals is also increasing, more and more users want interactive *self-service* websites to reduce the time and effort of consuming a service. This case study highlights the emergence of a customer *self-service* portal, its benefits, pitfalls and more.

The service desk is where **ITIL** can really shine. In ITIL, the service desk function performs a number of critical tasks. To say it is simply the traditional help desk renamed does not do the service desk justice. In many respects, the service

desk's role as the **single point of contact** is one of the most important facets because the service desk personnel are customer facing. In other words, the professionalism, communication skills and overall attitudes of service desk personnel will reflect upon the entire IT organisation and serve as the measure by which all of IT will be judged. In terms of benefits the service desk brings, this case study explores its role as the single point of contact between ICT and its customers.

For the purposes of this case study, let's label the people contacting the service desk as "clients" for simplicity whereas ITIL differentiates between the users of services and the customers who actually pay for the services.

Having explained that nuance, clients should not be forced to try and contact **various** numbers, email addresses and/or websites for assistance. First off, with incidents they are already frustrated because they can't do their jobs and calling all over again, in vain, will only make matters worse.

Second, we, as an organisation, wanted these people working, not wasting time trying to get help because any time spent on efforts other than helping the organisation attain its goals is time irrevocably lost.

Instead, by consolidating the point of contact to one website, the ambiguity over whom to contact when some event happens, or need arises, is removed. By having one point of contact, callers can immediately reach a representative, answer the necessary questions to populate the incident or service request and then go back to work.

This is very important because we need them to be productive in their roles so they can move the organization towards its goals in order for ICT to have a reason to exist.

This isn't a one-sided benefit. For ICT, there are very real benefits as well. For example, ICT personnel are no longer haphazardly interrupted by callers needing help or ambushed while walking down the corridor. Anytime someone is working and interrupted, there are switching costs associated with them changing trains of thought from one task, to the new task and then attempting to get back into the "groove" of the old task.

If ICT can't account for activity and reflect the value it adds to the organisation relative to its costs, then ICT risks being outsourced or downsized. Many business people do not realize that by skipping the service desk, they are ultimately causing long-term harm to the organisation. In addition to the accounting costs, there are **economic opportunity** costs. The ICT resource that takes a call or assists a caller will likely need to stop doing their assigned work in order to help. As a result, planned work stops. Again, it is much better to have the client **self-service** the incident, the system then follows the established rules on selecting the correct ICT resource to use.

A risk with the old fashioned way of receiving phone calls was in the accounting and economic cost impacts in that a caller may leave voicemails and emails to many ICT personnel resulting in redundant responses from ICT that waste resources. From an accounting cost perspective, clients may be using ICT's most expensive resources vs. using designated personnel because of relationships, simply going down the ICT phone list looking at titles, etc. When the users need help, unless there is a coordinating influence, they will call whomever they think can help. Instead, if they self-service the incident can then be properly routed based on skills required, resource availability, defined service level agreements, etc.

ICT must understand its costs and value-add to the organisation at all times. If callers are bypassing the formal recording mechanisms and going straight to their favourite resources, or resources at random, unrecorded and untracked activity takes place.

Traditionally by using a service desk to log and filter calls, matching can be performed to see if the incident record is already in the system, what the status of the incident is and so on.

Once the initial call is logged, clients often want status updates and then may begin a new flurry of calls further interrupting personnel. Instead of this, the service desk can keep the customer and/or user informed both proactively and reactively.

A proactive approach, whether by phone or email, by the ICT Service desk can reap rewards as well. Clients just want to know that their needs are being addressed.

From a reactive perspective, clients wanting status updates should look up the service desk. The intent, as with other issues brought up previously, is to shield the rest of ICT from the interruptions and to place the ownership of ensuring the caller is taken care on the service desk.

The case for a phone line

Moreover, the service desk personnel must be professionals who are skilled empathetic communicators, which are capabilities that not all ICT people have. Again, people will judge all of ICT by the experiences they have when talking to the individuals who help them. Choose your service desk people with care.

Lastly, by routing clients through the service desk, the service desk can track all open unresolved service request and incidents, determine if they are being resolved on a timely basis, escalating if needed and so on.

No longer does a call “fall through the cracks” because a desktop services technician is out sick, on vacation, too buried with other work and so on. Because the incident or service request is being actively monitored by the service desk, there is an assurance to the client and management that agreed upon service levels will be met.

In summary, there are many benefits both to this business and ICT by focusing all user contact, both incoming and outbound, through the service desk. By doing so, the proper resources can be used to make sure that needs are met on a timely, effective, efficient and economical basis.

Acknowledgements

HDAA: <<http://www.hdaa.com.au/>>

UTS self service desk: <<https://servicedesk.uts.edu.au/CAisd/pdmweb.exe>>

The self service desk Uni of Lechester UK: <<http://www.le.ac.uk/its/help/sshd.html>>

NSW Department of Health: <<http://www.mhcs.health.nsw.gov.au/index.html>>

The Techrepublic: <<http://www.techrepublic.com/whitepapers>>

BMC Service Desk Express Client Services: <<http://documents.bmc.com/products/documents/12/43/91243/91243.pdf>>

Dell: “The Benefits of a Single Point of Contact” August 10, 2006 by George Spafford:

<<http://www.itsmwatch.com/itil/article.php/3625741>>

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