

***Roadmap for  
Selecting a Help Desk  
Outsourcing Partner***



**Making Technology Work for You**

## ***Roadmap for Selecting a Help Desk Outsourcing Partner***

You've likely chosen vendors before. But like most things, selecting a help desk outsourcer has a learning curve. Wouldn't it be great if a help desk insider or someone who just went through the process could hand you their notes: what to look for, what to avoid, and what to ask? This paper is intended to provide you exactly that: a roadmap to bring you quickly up the curve, with a process and criteria to help you find the right fit for your specific needs and to avoid common pitfalls in selecting your new help desk partner.

### **First Things First: Know Thyself**

The old adage, "If you don't know where you're going, any road will take you there" applies. It's important to clearly articulate *why* you are in the market to outsource; whether it's your first time or you're looking to replace your current vendor. Improved service levels, cost reduction, and freeing up IT staff are all typical goals, but discuss and decide their relative importance to your organization. ***If you have five goals, rank them from number one down to number five.***

A quick self-assessment of where you stand today, vis-à-vis the support already offered employees, is also helpful. Use any metrics you have in place to objectively measure and demonstrate the current service levels; as you move ahead with a



vendor, you'll have a benchmark to use when evaluating a future outsourcer. Have your priorities and your current support metrics ready to share. ***The more precise information you can provide potential vendors upfront, the more accurate their quote on a proposed solution will be.***

## Trim Your Vendor List

You don't have time to interview everyone. Criteria that can cut the list down to a manageable size include:

Experience in serving firms your size. Your employee count is an excellent indicator of complexity and scale issues that a vendor will need to address in servicing your account. You *don't* want to be an outsourcer's learning curve. Make sure potential partners can demonstrate that their customer base includes a healthy number of companies your size – some of whom should be offered as references.

### First Cut Criteria:

- **Number of Clients Your Firm's Size**
- **Help Desk Focus**
- **Financial Stamina**
- **Flat Organization**

Help desk is their lifeblood. Jack of all trades, master of none? *If they don't bill at least 50 percent of their revenue from help desk services, beware.* Times are tough. Technology investment is spent on "critical" business areas – if help desk is just an add-on service, it's unlikely it will see the financial support and development resources that larger business units will garner. Ancillary help desk units could potentially be a likely area for cuts that could adversely impact your service.

Financial staying power. The current economic downturn is not irrelevant. Select firms that have successfully weathered economic dips before. It demonstrates they know *how to keep customers happy and manage their cash flow at the same time.* You don't want to have to oversee a relationship with a partner in financial distress, or worse have your help desk outsourcer fail, forcing you to undertake the selection process all over again.

Few management layers. Even if you pick the best possible fit for your company, all relationships hit rough spots. *How quickly can you elevate your concerns* to their upper management? It depends largely on how many layers of management you'll need to cut through to get to the top. Ask to see their organization chart, and avoid anyone with more than three layers.



## Questions that Help Desk Insiders Would Ask

### To Ensure Great Service

Three key critical components to world-class help desk support are people, process, and technology. An outsourcer's service is only as strong as the weakest link. Cover each area in depth during vendor interviews:

- **People:** Ask prospective vendors to walk you through their hiring practices. What do they look for in an agent? (*Both technology and people skills* are what you're seeking here.) Once hired, what initial training do agents receive? How frequent is the ongoing training?



- **Process:** Don't just ask for certifications. *Also ask about best practices.* An ongoing commitment to best practices is easily demonstrated by adequate staffing, call monitoring, frequent client contact, first call resolution, extent of documentation, knowledge base, speed to answer, incident management, escalation procedures, ITIL and HDI certifications, and so on.

- **Technology:** A detailed look at the outsourcer's technology is important. After all, it effectively becomes your technology when you ink the contract. What kind of ACD (Automatic Call Distribution) system do they use? What type of metrics does it provide? Are calls recorded and monitored? Is the ticketing Web-based and Web-enabled to support a mobile workforce? What is their system up-time? Are key metrics tracked and readily available? A solid outsourcer should have no problem with your request to have your IT specialists *"look under the hood."*

## Questions that Help Desk Insiders Would Ask

### To Stay In Control

Metrics are absolutely essential in maintaining control over this relationship and the service you will receive.

• **What will be measured?** Get a list of everything the outsourcer measures. Look for information that drills down to the details. For example, *is productivity measured right down to the agent level to evaluate staff?* Or, if you rolled out an application to one area, could you track the specific issues users might be experiencing *before* the new application was implemented company-wide? Are there satisfaction surveys and how often are they administered?

• **How is data reported to you?** There's certainly a difference between "data" and "information." Few companies have the time or staff resources to scrub, format, and interpret ongoing large volumes of raw data. If you want the vendor to manage these responsibilities, request to see the actual reports you will receive. Ask them to walk

through what they consider to be the top reports and outline how *and why* you should read them. ***Also make sure reporting is available to you on demand;*** don't be stuck waiting for them to produce reports on *their* timetable!

• **How will the outsourcer use the metrics?** With what frequency will the vendor review the measurements, interpret, and then ***offer best practices solutions and recommendations?*** For example...are they using metrics to monitor trends and formulate plans to implement call avoidance procedures? Will metrics include not only information relating to the vendor's performance but also the performance of your internal IT organization? Have key performance indicators been established based on metrics and what are they?

**Outsourcing doesn't necessarily mean any loss of control.**

**With detailed, on-demand metrics, you can actually increase your control over your help desk services.**

## Questions that Help Desk Insiders Would Ask

### To Stay In Control (cont.)

• How will business reviews be handled? The strongest seamless relationships are forged with ongoing information exchange at multiple levels. Determine the vendor's recommended process for ongoing exchanges between your two companies at the operational level. As for semi-annual business reviews with your CIO/VP of IT, *who will be attending on the vendor's side:* their management or a sales representative? With their management in attendance, you have a greater opportunity to tap their expertise and determine if they qualify to serve as "trusted advisors" to your IT team on issues, perhaps even beyond the help desk.

### To Achieve Seamless Support

Don't overlook your proprietary applications! If you want these supported, be able to clearly outline such areas for the vendor's review. Ask what processes the outsourcer has in place to come up-to-speed and *how support for proprietary apps will be incorporated* moving forward. (An experienced vendor should be able to provide multiple examples of how they have achieved this with other accounts.) It's a sticky area that merits your time to dig down into the nitty gritty daily operations to clearly outline exactly what their support includes. For example, who bears responsibility for ongoing documentation? If it's the vendor, what is their process for keeping documentation up-to-date? A few very pointed questions in this area can be quite revealing as to the scope of service provided.



### To Identify the One with Long-term Potential

Looking for a partner that can grow with you? Proceed with caution here! In picking a winner, look for two key criteria: their *technical ability* to meet your changing needs and their commitment to identify and help you *reduce costs* on an ongoing basis.

## Questions that Help Desk Insiders Would Ask

### To Identify the One with Long-term Potential (cont.)

- **Technical Growth Potential** Check the hardware first. Any firm can add people, but look closely at their *infrastructure* to ensure it, too, is scalable. Second, ask about expertise beyond help desk services that you can tap for *special projects* as they arise. As your help desk partner, the firm would already be familiar with your existing systems, personnel, and culture, which should cut the time needed to come up to speed (fewer hours = more affordable!) IF they have established, complementary expertise. Do they have experienced staff offering services, such as network consulting, rollouts, desktop support, and IMACs? Be sure to look for companies that can outline how they would expand help desk support temporarily to *handle non-permanent spikes* as new projects roll through.

- **Reducing Cost Focus** Ask open-ended questions about improving productivity and boosting your bottom line, such as, “Can you give me examples in which you came up with a solution for an existing client where it lowered your bill to them?” or “What are call avoidance procedures that you recommend (and measure!)?” If this is part of their ongoing commitment to other accounts, they should have no problem providing you with examples. In these situations, how were the cost savings ideas communicated to those accounts’ management teams? Ideally, you want a firm that *routinely presents productivity opportunities* in their regularly scheduled top-to-top annual account reviews. If they know you want to be presented with cost savings ideas...they’ll be looking for them!

### To Cross the Finish Line: Site Visit!

No thorough evaluation is complete without a site visit to the vendor--and not just to their conference room! Ask to tour their data center. Walk around the floor where agents are taking calls. Ask to meet with people



## Questions that Help Desk Insiders Would Ask

### To Cross the Finish Line: Site Visit! (cont.)

who will be on the phone with your employees when they need help. The “people behind the PowerPoint presentations” are where the rubber meets the road. In the strongest, most productive help desk partnerships, corporate cultures are complementary. More likely than not, you’ll walk out of your site visit with a gut feel of whether or not a vendor will be a good match for your firm.

One more thought on site visits: ***make them an annual event!*** Keep a finger on the pulse of your partner’s business by scheduling a trip each year. Go through the



same routine...ask to see what’s new in the data center and stop and chat with help desk agents serving your account. There’s nothing quite like a firsthand view to assess your partner’s ongoing well-being.

### Ready to Hit the Road?

Just as you wouldn’t choose a hosting provider or supplier without conducting the appropriate due diligence, selecting a help desk outsourcer for your company requires a thoughtful, comprehensive reflection about your needs and expectations and the potential vendors that can fulfill—or better yet, exceed—them. Walking through this suggested roadmap helps you gather the information necessary to ensure you find not only a help desk vendor, but a partner that offers your employees great service, identifies cost savings, and provides irreplaceable IT expertise. ***Trust comes with time, but upfront work and tough questions go a long way to picking the help desk provider right for you.***

## About ABS Associates

ABS Associates, Inc. serves clients across the nation with comprehensive outsourced help desk, desktop, managed hosting, and network support and solutions. For more than 25 years, ABS certified support professionals have expertly delivered IT solutions, helping hundreds of companies control capital expenses and support costs, improve company focus, and increase end-user productivity. *ABS*help**<sup>™</sup>, the company's Web-enabled knowledge center, assumes the burden of IT support, eliminates distractions, and allows firms around the world to concentrate on achieving strategic business objectives. For more information, please visit [www.abs-inc.com](http://www.abs-inc.com).

