



The Monarch Bay Help Desk Handbook

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Table of Contents

WELCOME!	1
WHY YOU (PROBABLY!) NEED A HELP DESK	2
WHAT DOES A HELP DESK DO?	2
JUSTIFYING THE EXTERNAL HELP DESK.....	2
JUSTIFYING THE IN-HOUSE HELP DESK	3
<i>How to leverage your Help Desk people</i>	4
<i>Why a help desk is better than a lone expert</i>	5
<i>Hidden benefits of a Help Desk department</i>	5
BRIEF HISTORY OF THE IN-HOUSE HELP DESK	6
CALL THE DEVELOPER!	6
CHARGING FOR SUPPORT	6
INDEPENDENT SUPPORT PROVIDERS	7
HURRY UP AND WAIT	7
LIBRARIANS OF KNOWLEDGE.....	7
STAFFING YOUR HELP DESK	8
HOW TO CHOOSE YOUR STAFF	9
<i>Ranking of Help Desk technician attributes</i>	9
<i>Promoting from within</i>	10
<i>Hiring from outside</i>	10
A MORE DETAILED LOOK AT STAFFING REQUIREMENTS	11
<i>Evaluate statistics</i>	11
<i>Quantify your service commitment to your callers</i>	11
<i>Use customer surveys</i>	11
CHOOSING YOUR HELP DESK HARDWARE	12
FOR THE ENTIRE DEPARTMENT	12
FOR EACH HELP DESK TECHNICIAN	12
WHAT'S IMPORTANT AND WHY	13
THE HELP DESK ENVIRONMENT.....	13
<i>Reduce noise levels</i>	13
<i>Reduce glaring lights</i>	14
PROVIDING SUFFICIENT SPACE ON THE SERVER.....	14
<i>Space for old programs and environments</i>	14
HOW MANY HELP DESKS?	15
TARGET KNOWLEDGE	15
STAFF REQUIREMENTS	15
PROBLEM RESOLUTION EFFICIENCY	15
CHOOSING YOUR HELP DESK SOFTWARE	16
EXPERIENCE COUNTS	16
FAST USER INTERFACE.....	16
EASE OF USE	16
HIGH VALUE, MODERATE COST	17
QUALITY TECHNICAL SUPPORT, OF COURSE!.....	17
USEFUL REPORTING	17
PRIORITY ESCALATION	18
WIDE NETWORK SUPPORT AND PLATFORM FLEXIBILITY	18
SECURITY FEATURES	18
DIAGNOSTIC TOOLS	18
PAGERS	18
SUPPORT FOR E-MAIL SYSTEMS	19
KNOWLEDGE BASE OPTIONS	19

HELP DESK SUPPORT ESSENTIALS	19
HOURS OF OPERATION	19
ANALYZING THE PERFORMANCE OF HELP DESK TECHNICIANS	19
DEFINE YOUR SUPPORT OBJECTIVES	20
<i>List the Objectives</i>	20
<i>Track Your Progress on Your Objectives</i>	21
HANDLING CALLS	21
MAKE SURE THEY HAVE THE APPROPRIATE SKILLS	21
PROVIDING INCENTIVES.....	22
SUPPORT YOUR HELP DESK	23
RATING THE PRODUCTIVITY OF YOUR HELP DESK	23
<i>Number of calls answered in a day</i>	23
<i>Number of minutes on hold</i>	24
<i>Number of minutes taken to answer the question / solve the problem</i>	24
<i>Number of calls forwarded outside the department</i>	24
DISCOVERING PATTERNS WITH REPORTS	24
IDENTIFYING “HIGH-MAINTENANCE” CUSTOMERS	24
IDENTIFYING TROUBLESOME SOFTWARE OR HARDWARE	25
IDENTIFYING LESS EFFECTIVE HELP DESK TECHNICIANS	25
DISCOVERING DEPARTMENT TRENDS	25
FIXING PROBLEMS WITH TRAINING.....	25
TRAINING FACILITIES.....	26
WHO YOU SHOULD TRAIN	26
<i>Training department managers</i>	26
WHAT YOU SHOULD TEACH	27
WHEN YOU SHOULD TRAIN	28
<i>Testing your employees</i>	29
<i>Self-training</i>	30
<i>Best actual training times</i>	30
TIME TO GET STARTED!	30

This handbook will help you set up a new Help Desk or improve your existing Help Desk

Welcome!

Welcome to this exclusive handbook, brought to you by *Monarch Bay Software, Inc.*, the makers of *HelpTrac for Windows* help desk software.

This handbook is designed to assist you in two ways: 1) to help you set up a new Help Desk department for your company, and 2) to help you improve your existing Help Desk department.

This information addresses both the *in-house* Help Desk (a department for supporting your own employees) and the *external* Help Desk (supporting your customers who call in with problems or questions), along with issues that are common among both.

By the time you finish reading this, you will easily be able to conceptualize exactly what you'll need in setting up a new department -- and exactly what you can do to improve your existing one.

We welcome your feedback. If you have any comments, questions or suggestions, please contact us at 1-800-450-6250 or Fax: (713)-451-8312 or CompuServe: 74040,1123. We're happy to answer your questions in the context of helping you improve your Help Desk department.

Enjoy the reading!

Why you (probably!) need a help desk

To start, let's tackle the most basic question of all:

What does a help desk do?

Here's our definition:

Help Desk: A department in a company that is dedicated to the technical support of its own employees. Typically, this encompasses computer hardware and software support, and it may also include other functions such as ongoing quality assurance, inventory management, etc.

For *external* Help Desks (typically called customer service departments), the definition is similar: A group that fields questions and resolves problems, with the same end goal in mind—keeping the end-user productive and satisfied.

However, here's a more typical definition of the in-house Help Desk, one that is unfortunately far more common in today's businesses:

Help Desk: The nerdy-looking guy in the back cubicle with a VR helmet on his head who knows the secret hot-keys to every Windows, OS/2 and UNIX application in existence. All the employees in the department know his extension, and they call him with every little problem, causing him to finish almost none of his own work.

This is the natural way a Help Desk gets started, though. And it takes real, concentrated effort to tear away from this and bring structure to the task of supporting the employees.

Justifying the external Help Desk

One of the very first questions you probably had when you started thinking about a Help Desk department was, "Why do I really need one?"

Or, stated in a different way, "Can I really justify the expense of a Help Desk department?" "Does it actually pay off in expense reduction or increased sales?"

Though there have been countless books and case studies written about companies who have succeeded largely because of excellent service (including problem resolution), assessing the monetary value of the external Help Desk can be a difficult exercise. You're dealing not only with countable things such as product returns (and how to reduce them through effective support), but also qualitative issues like public opinion.

While measuring the benefits of an external Help Desk is beyond the scope of this book, there are many parallels between the internal and external help desk in terms of financial return. However, for most

There's an 85% functional overlap between the internal help desk and external customer support operations.

Companies need to stop relying on the computer guru to solve everybody's problems.

companies, the primary benefit is different: The *external* help desk increases revenue by encouraging repeat business and product usage, while the *internal* help desk saves money that would otherwise be wasted on lost productivity.

Justifying the in-house Help Desk

In a cost-cutting environment, internal help desks are often seen as an expendable luxury. However, nowhere is the need for productivity greater than in a recently downsized or reorganized company. Employees may be responsible for work once covered by two or three people, often on unfamiliar systems with little training or preparation. In this situation, it's clear that the expected cost savings will never materialize if employees can't get their work done.

Even under normal circumstances, demonstrating the financial benefit of an in-house Help Desk is relatively easy, once you calculate the true dollar value of lost productivity. That's why we cover it here in some detail.

What does an hour of employee productivity cost your company?

One common mistake companies make is believing that the **salary** they pay an employee is equivalent to the expense. Following this line of thinking, you might think that an hour of productivity from an employee costs around \$18 / hour (based on a salaried \$35,000 / year employee).

However, the **actual cost** of an hour of productivity is really many times higher. First, remember to include all the fringe benefits and payroll taxes for the employee. This alone will typically add at least 15% above and beyond their salary. Next, figure in all the computer equipment you have to **buy** and **maintain** for this employee, probably somewhere in the neighborhood of at least \$5,000 per station.

Next, consider the time that been invested in training the employee. And what about the expense of their office space and other occupancy charges?

And to take it even further, if we're talking about sales or marketing staff, you also have to consider the cost and time of obtaining sales. In other words, if you spend \$25 getting a sales lead for your product and you hand it over to your salesperson, you are essentially **investing** another \$25 in that person's job function. If they miss the sale, you've just wasted \$25.

In addition to all this, there's also company overhead such as insurance, taxes, company business cards, stationery, etc., and other expenses that are driven by the number of employees you have.

Now, when you figure all this, how much is an hour of employee productivity really costing you? It's probably a lot closer to \$70 an hour. It's **at least** \$50 an hour.

Treating employee support as expendable can backfire severely—it's like throwing oars off a sinking boat to make it lighter.

A typical employee actually costs close to \$70 an hour.

Hard to believe? That's why you typically find that companies who produce less than \$50 in revenues **per hour** per employee are not profitable. Think about your own company. How much revenue are you producing per hour, per employee?

How to leverage your Help Desk people

Every hour of lost productivity costs you at least \$50.

So if an hour of productivity from an employee costs you at least \$50, what happens every time they lose an hour because they can't get something to work right? You lose \$50.

So every time an employee can't figure out how to find a file on the server or merge two documents in Word -- or if their CONFIG.SYS file needs some serious editing or if their WIN.INI file is a mess – that's costing you at least \$50 per hour.

Here's the magic. You can hire an expert to work in the Help Desk department. You Pay them \$20 an hour (really meaning \$50 - \$70) to solve other people's problems. So if it takes your average salesperson an hour to figure out a solution, how long would it take the expert? Perhaps five or ten minutes?

With the right Help Desk technician, you can spend \$10 to save \$50.

Suddenly, you've spent \$10 (that's ten minutes of expert time at \$60 an hour) to save yourself \$50 (that's an hour of the salesperson's time.)

As an investment, you've realized a 500% return -- simply by providing a mechanism whereby the salesperson can find the expert and the expert can solve the problem.

	How Long To Fix	Cost to Fix the Problem
Salesperson	60 minutes	\$50
Help Desk expert	10 minutes	\$10

Suppose the expert was working on solving problems only 50% of the time, and suppose he can solve problems five times faster than regular, everyday employees.

One technician can save your company \$120 for every hour they spend solving problems.

He would then be saving you an average of \$40 for every problem he works on a problem, or \$120 for every hour he's there.

So \$120 / hour x 8 hours / day x 5 days / week x 50 weeks / year = what?

How much did this Help Desk expert actually save you in lost productivity? It comes out to about a **quarter of a million dollars.** And this is net savings because we've already taken into account that each hour of the guru's time costs you \$60. Those savings go right to the bottom line.

"The most expensive support option a company can implement is sneakernet to the PC guru."

That's exactly why Joe Jacoboni, president of *Software Support*, and independent support provider says, "The most expensive support option a company can implement is sneakernet to the PC guru."

This formula, by the way, also explains why it always makes good sense to buy the fastest computer equipment for your employees. Because saving even \$500 per unit is really a bad investment. Based on the formula presented earlier, you would start losing money if that slower computer caused more than 500 minutes in delays for the employee.

500 minutes in a year is approximately two minutes a day. Two minutes a day! That means if their work is slowed by anything more than two minutes due to the slower computer, you're losing money immediately.

The same thing applies to other computer components such as RAM. Using similar calculations, you can quickly see why buying your employees plenty of RAM will pay for itself in a year or less -- especially with today's RAM-intensive operating systems and applications.

Why a help desk is better than a lone expert

A lot of people, then, start wondering why they can't simply realize these savings with one designated expert. You might think that you could just "assign" this person to support problems and then experience the \$250,000 in savings we just discussed. However, this is almost never the case. Why?

Experts need the right tools to be effective.

Because without a streamlined help ticket tracking , the person would never have the kind of efficiency necessary to solve people's problems in ten minutes. After all, if you're hiring a Help Desk technician at the cost of \$60 an hour to help other employees at a potential savings of \$120 an hour (and nearly \$250,000 a year), wouldn't it seem rather ridiculous to not give him the tools he needs to be efficient?

When you consider the total savings potential in a Help Desk, the actual cost of software like *HelpTrac* looks almost insignificant. It pays for itself in the first week.

Hidden benefits of a Help Desk department

You'll also experience hidden benefits when you start using *HelpTrac*: your employees will suddenly begin to feel more effective and less frustrated. They appreciate having a place to call for answers to their computer questions. And above all, they'll feel that you care about helping them do a good job.

So not only will your Help Desk department directly save you money, it will also indirectly help increase employee morale—which, in turn, also increases productivity.

Brief history of the in-house Help Desk

The centralized in-house help desk is relatively new. Why? Because computers haven't been on the desks of many employees for very long. Ten years ago, desktop computers were uncommon, except among sophisticated technical and financial users. Today, few employees could function without one.

Support used to come from the department's local MIS expert.

In the "old days," when people had problems, the support usually came from the department's MIS person. And this person may have been primarily responsible for the company's operating systems (and may have even written the code). When called upon, they would also help individuals with their personal computer problems.

But as the number of computers appearing on employees' desks began to explode, and local area networks began to emerge and proliferate, the MIS people discovered they had neither the time nor the experience to properly handle hardware and software questions from all employees, particularly for software that was not written in-house. So the employees took the matter into their own hands.

Call the developer!

En masse, frustrated employees began calling the software developers directly, asking specific questions of, "How do I do this?" And while many software companies themselves were trying to cut expenses in their support groups (and therefore making people wait even *longer* on hold), the number of people calling for tech support steadily grew. A real problem was unfolding.

As a result, three things happened:

1. Software companies began charging for support services that were once free.
2. A new breed of independent support companies appeared.
3. Companies ultimately realized that having their employees waiting on the phone for half an hour at a time in order to get a software question answered was not efficient use of their time.

Charging for support

Increasingly, technical support is being charged by the minute or by the question.

If you call a software company for support these days, you'd better have a credit card handy. These days, free technical support with a live person is nearly extinct, and by-the-minute support continues to grow.

According to *LAN Magazine* (August, 1996), "As a possible remedy to the problem of the support department becoming a resource drain and as an avenue to provide better support, over the last two or three years vendors have begun to charge customers for support services. The idea is not to

generate funds for profit, but rather to reinvest in and to upgrade their call systems, provide better training, make the technical support position more attractive to employees, and to add value to their customer support.”

In addition, tech companies have been escalating their use of automated and self-service help—through menu-driven voice response units, fax-back services, and online searchable data bases accessible through the Internet. While extremely useful given the right circumstances, these methods require more time on the part of the user, and can be extremely frustrating to an employee with a question that’s not on the menu.

Independent support providers

To help fill the gaps in software support, a number of third-party support providers have appeared on the scene. These are actually giant Help Desks that charge their customers anywhere from \$15 to \$50 to answer a question. These companies include *PC Helps Support*, *Softmart* and *Software Support*. Some are time-based, others are per-question. Most offer a yearly support subscription on a per-person basis.

(Note: Another recent trend is to outsource the internal support function to a third party that operates on-site. Sometimes these consultants blend in so well that few people know that they’re not really employees. However, unless you’re talking about using consultants for short-term special need, handling the in-house help desk function in this way can be the *most* expensive way to go.)

Hurry up and wait

Companies soon realized that having their employees waiting on the phone for hours at a time was not at all efficient. Besides, the corporation was often paying for the phone call and the support charges, too. It then seemed to be cheaper for the company to hire its own help desk specialists who could answer most questions internally, eliminating the need to pay a vendor to answer basic questions.

Interestingly, the majority of questions do fall into the category of "beginner's questions." That is, the commonly-asked questions that can be easily answered by a specialist. So it seemed that having an in-house support person would drastically reduce the tech support charges and the time wasted on the phone.

Librarians of knowledge

The role of the support specialist quickly evolved into being a *librarian of knowledge*. It became far more important to know how to find the right answer rather than knowing the right answer. These days, Help Desk people are really experts *of reference*. The enormous selection of hardware and software available today guarantees that no single person

Help desk staff need to know where to find the right answer more than actually knowing it.

can possibly acquire and memorize solutions to everything out there, so instead, they learn how to get solutions and distribute those solutions to employees.

And in this role, *trouble tickets* are critical -- they allow the staff to keep a history of each employee and each problem. Not only does this organize work flow, it allows the staff to build a database of solutions. That's where help desk software enters the picture.

Staffing your Help Desk

Once you've make the decision to set up your Help Desk, your next decision is, "How many technicians do I need?" Or, put differently, "What size Help Desk department will optimize savings?"

To answer this question, you'll need to consider: (for In-house Help Desks)

- **Number of employees that will need support**
- **Quality of training that you are already providing**
- **Ease-of-use of the software and hardware you're using throughout the company**
- **Reliability and age of the hardware**
- **Geographic dispersion of employees, time zones and expected peak calling hours.**

For External Help Desks, consider:

- **Number of customers that will need support**
- **Their overall level of expertise in using your product or service**
- **Ease-of-use of the products you're supporting**
- **Expected call volume on a per-hour basis**
- **Frequency of product revisions or new product releases**

For In-house Help Desks, the number of employees needing support will be your first decision factor. Here's a table that offers some general guidelines on the technician-to-employee ratio.

Number of Employees	Recommended # of Technicians
less than 100	2
100 - 250	3

You'll notice that the ratios here aren't constant. As you have more employees, there are economies of scale -- because many problems will simply be repeats of a problem that somebody else had. Also, through network administration, a single technician can often manage configurations for a hundred people as easily as for one person.

And once you get your Help Desk department going, your staff will probably be extremely busy for the first few months. Then, the pace will gradually slow because you're building a database of solutions that he can be applied to many problems.

Also keep in mind that there's more to the job than phone work. Some companies split telephone responsibilities into shifts, so that during an off shift support staff can do research, write bulletins, or conduct training.

How to choose your staff

When it comes to staffing your Help Desk department you'll want to keep the following characteristics in mind:

- **Ability to get along with people (and care about their problems)**
- **Ability to stay organized and operate with concentration even when there are a dozen or more projects going**
- **Intelligence and ability to learn quickly**
- **Technical knowledge**

The #1 attribute of successful Help Desk technicians is their ability to get along with other people.

We believe this list also represents the order of importance for these attributes. You might think "technical knowledge" is really the #1 attribute, but while it's certainly important, it's also something that can easily be learned. People skills can't be learned as easily, so you need to make sure your technician has the trait to begin with.

Ranking of Help Desk technician attributes

An interesting study by the Help Desk Institute in 1993 offers a ranking of technician attributes that's still worth looking at:

- **General communication skills**
- **Telephone customer service**
- **Temperament**
- **General intelligence**
- **Problem-solving skills**

- **Persistence**
- **Technical skills**
- **Team player**
- **Flexible and adaptable**
- **Responsible, independent**
- **Organizational skills**

At least four of these skills and attributes fall into the category of "attitude," so we suggest that first screening out people with "marginal" attitudes will yield more successful Help Desk technicians. After all, you can always teach them about your products. But you can't teach attitude.

Promoting from within

Perhaps the best way to find qualified Help Desk technicians is to scout your own employees. If you can find people who are already liked and respected by others, they may be perfect candidates.

Don't be afraid to bring someone into the position who isn't quite an expert yet. Many of our *HelpTrac* customers have the greatest success when they look for people with the ability to help other people rather than people with technical knowledge. What you don't want is a technical wizard with a superiority complex. You need someone with a "coach" mentality -- someone with humility and patience.

Hiring from outside

Generally speaking, it can be extremely challenging to find good help desk technicians. Not only do you have to weed through all the applicants to find the ones with the right attitude (because that doesn't appear on the resumes!), but you'll also have to educate them on how your company works -- something that the current employee may already know.

Another consideration: finding a good, unemployed Help Desk person is a rarity. That's because these people are so difficult to find and they add so much value to a company that other companies won't let them go. If you do find any, however, grab them!

When looking for a Help Desk person, you can also look for people with experience in similar fields -- like systems analysts or trainers. These folks often have just the right qualities for doing well in a Help Desk environment. At the same time, if they have any experience at all, they're also a bit more demanding salary-wise.

We tend to shy away from hiring someone right out of college into a senior position of your Help Desk. They're easier to find, and less expensive than those with experience. But are they experienced enough

It's difficult to find a good Help Desk technician who is unemployed.

(and mature enough) to professionally handle all the challenges of a Help Desk department?

However, these people may be perfect candidates for researchers or assistants to the experts. Then, they can grow into the top job over time. Keeps your expectations realistic: it can take from six months to a year before that person really becomes an expert.

A more detailed look at staffing requirements

How do you decide the number of Help Desk technicians you need? While there's no simple answer, here are some issues to consider:

Evaluate statistics

Using report information gleaned from both your Help Desk software and your phone system, look at statistics like:

- **# of calls handled per technician**
- **# of calls per time of day**
- **# of calls per day of the week**
- **# of abandoned calls (they hung up)**
- **Average time on hold**
- **Average call duration**

Quantify your service commitment to your callers

As we mention elsewhere in this booklet, you'll need to quantify (as much as possible) your goals and objectives in providing service. One example might be, "I want to reduce product returns by 15%." This would be a real, measurable goal.

Then, to help determine the number of technicians needed, keep your eye on the 15% goal.

Use customer surveys

The most direct way to determine when you need more technicians is to survey your callers. A drop in satisfaction can, of course, mean several things. One of those things may be "not enough technicians." So examine the causes carefully.

Choosing your Help Desk hardware

In order to get your Help Desk department running as smoothly as possible, you'll need plenty of hardware. But don't fret -- this pays for itself very quickly, remember!

For the entire department

- **At least one separate phone line and modem (for Help Desk only!)**
- **A separate fax machine**

And a "Help Desk" server with:

- **Fastest CPU available**
- **32MB RAM**
- **4GB hard drive space for every 1000 employees you're supporting**
- **A fast, reliable backup system**

Depending on the size of your Help Desk, you may also want to investigate the necessary telephone equipment such as an Automatic Call Sequencer (the machine that queues callers and distributes their calls to the next available technician) or other appropriate equipment. This equipment is not discussed in this booklet—it's expensive and a high-end capability.

For each Help Desk technician

- **Top-of-the-line, fastest CPU available**
- **At least 32MB RAM**
- **Quality, 17" monitor**
- **At least 1GB of hard drive space**
- **Very comfortable chairs**
- **Telephone headsets, compatible with your phone system**
- **A good mouse and comfortable keyboard**
- **A fast modem and external phone line**
- **Internet and CompuServe access (to find solutions)**

Telephone headsets are critical. Spend the money necessary to get good ones.

What's important and why

The **telephone headsets** are critical. It allows your people to fully navigate the *HelpTrac* user interface and take notes while they're on the phone with an employee. A good headset costs less than \$150 and pays for itself in a matter of days. It also reduces the neck and shoulder strain on your technician. Both WICOM and PLANTRONICS make such headsets.

The **hard drive** space on the server is very important, too. You'll want enough so that the department can keep their entire ticket history database available. This database will grow at a tremendous rate. If there's not enough room to keep it all on-line, your technicians will need to do a RESTORE before they can access someone's job ticket history, slowing down the entire process and leading to a loss in productivity.

The **fast CPU** on the workstations is critical as well, because these technicians will need to be able to bring up a person's record and history when that person calls. While *HelpTrac* is designed to allow this information to be brought up as quickly as possible (by doing partial character matches for names and phone numbers, for example), it also improves performance when there's a *fast computer* running it! Think about this: when an employee is calling your Help Desk department, there are actually two people being held up by the speed of the computer. So in this case, the computer speed is doubly important! Moreover, when a employee calls for help, they're already under some pressure—and when emotions are running high, even a short delay will seem unacceptable.

Finally, a **modem** and Internet access is essential, as more and more technical information is distributed across the web. Many companies underestimate the importance of providing external online access to employees, but the Internet has clearly become a primary (if not *the* primary) forum for solution-finding, downloading program fixes, and other activities essential to a Help Desk.

The Help Desk environment

As you consider the hardware you'll need to make available to the technicians, also adhere to the following rules of making their environment easy to work in:

Reduce noise levels

By using thick carpet on the floors and providing fabric-covered partitions, you'll significantly reduce the noise level in the Help Desk area. You'll also want to look into purchasing telephone headsets with **noise reduction circuitry** in order to provide a reduced-noise conversation for the caller and the technician.

Noise reduction is an often-overlooked issue.

Reduce glaring lights

Bad lighting conditions affect people in a very strong way. To provide your technicians a relaxing, headache-free environment for working, pay careful attention to the arrangements of the lights.

Make sure the office lights aren't creating glare on the technicians' monitors. This causes enormous eye strain and hurts productivity. You may even consider purchasing anti-glare filters for all the monitors.

Also, if the room has windows, be sure to provide the technicians with a way to control the incoming light with blinds or shades.

Providing sufficient space on the server

One common problem for Help Desk departments is the ever-increasing need for server space. As technicians build new solutions for recurring problems posed by callers, they simultaneously build a huge database of problems and their related solutions. This database never gets smaller -- it continues to occupy an increasing amount of server space.

Therefore, one very important feature of high-quality Help Desk software (and this is covered in more detail in the next section) is its ability to maintain an external archive that is still easily accessible when a technician needs to find a solution from the past.

Why don't you simply maintain the entire database on-line with huge multi-gigabyte hard drives? Aside from the expense, the main reason this is impractical is the *search time* required. In other words, the database needs to be reasonably small so that the database search engines can find information in a few seconds while the caller is on the phone. Maintaining a huge, on-line database will only slow down the search engines.

That's why an external -- yet easily accessible -- database archive is important to an efficient Help Desk department.

Space for old programs and environments

There's another important reason for providing a large amount of server hard drive space for Help Desk technicians -- "Problem re-creation."

Often, a caller may pose a question about an older piece of software or an older operating system. Sometimes, finding the solution for that problem requires the technician to actually set up that software or operating system (maybe both) and attempt to recreate the problem.

Obviously, this kind of activity requires HUGE amounts of storage. Because once a technician gets a piece of software installed, they will prefer to leave it installed rather than risk having to install it again in the future. Your server, then, quickly gets filled with various installations of

The ever-increasing demand for server space is a critical issue.

You'll also need plenty of space for other operating environments.

different versions of all the software used in your company or by your customers.

How many Help Desks?

Another important issue to decide before setting up your Help Desk is: how many Help Desks do I need? If your employee base (or customer base) is of sufficient size (and that's for you to determine, of course), you may be providing better support with two or more specialized Help Desk departments rather than a single large one.

The specialization decision usually involves tradeoffs of cost efficiency vs. quick response.

Many large software companies, for example, set up a Help Desk department for each of their software products. Each technician is only expected to provide solutions relating to their area of specialty. Because of this, problems are generally resolved more quickly, with higher caller satisfaction.

In deciding whether this works for you, consider these issues:

Target knowledge

With a single, combined Help Desk, your technicians must become experts on all your products and policies. If your company has a large number of products (or support issues), the sheer amount of information may overwhelm your technicians. And when they're suffering from "information overload," they generally don't offer good support.

You'll also spend more time training your technicians, because each technician must become an expert on every product.

Staff requirements

If you're staffing your Help Desk during evening and weekend hours, having separate Help Desks can often lead to excessive overhead because you'll need at least one person staffing each department during the extended hours. By consolidating your support during the off-hours, you might be able to have a single person handling *all* the late-night calls.

Problem resolution efficiency

With a centralized Help Desk, your "first-call" problem resolutions are often not impressive. This relates to point #1, where all your technicians are required to be experts in every product.

With multiple, specialized Help Desk departments, your technicians can often provide a real, workable solution during the first call.

Choosing your Help Desk software

There are many good reasons to choose *HelpTrac* as your software solution—and though we’re certainly recommending that you use *HelpTrac*, we think it’s important that you know why.

Experience counts

As you read this booklet, you may have noticed that we’re very comfortable with this topic because we’ve worked with literally hundreds of companies and Help Desk departments, making them more effective and efficient. Because of that, we can help you find the best answers to your own help desk questions.

We’ve put that knowledge and experience to good use in developing *HelpTrac*. At every stage of the design, we carefully considered how a Help Desk department works in the real world—and then designed the software to work with it. So you’ll probably begin to realize that *HelpTrac* matches the way a Help Desk actually works better than any other software out there. Moreover, we use *HelpTrac* ourselves to support our own customers, and we know it works well for us!

Fast user interface

Another major factor in your decision is the speed and efficiency of the user interface, and *HelpTrac* has been designed to be to be extremely fast online. Accessing a customer or employee record takes just seconds. The technician simply enters a partial name or phone number, and the record pops up. Experienced technicians can have the record loaded and on-screen, ready to use, in about four seconds. We’ve found no other Help Desk software that works this fast.

Entering information is also very efficient. For most fields, the technician simply uses "point-and-shoot" list boxes to get the right information into the *HelpTrac* database without a lot of typing.

Ease of use

This almost goes without saying—after all, the software itself should be invisible and not interfere with the business of problem-solving. But since the levels of experience and “computer aptitude” vary, how can ease of use be objectively measured?

One important indicator is the training time specified by the software vendor. We think it’s a red flag if a vendor suggests a week of offsite training for your staff! That’s why we encourage you to work with the *HelpTrac* demo software—you’ll quickly see that though the system is rich in features, the learning curve is short.

The speed of the Help Desk software is critical.

High value, moderate cost

The price of help desk software ranges from about \$250 to over \$10,000 per seat, though in the scheme of things it's quite economical given the impact it has on the effectiveness of your Help Desk and employee productivity.

At a typical cost of about \$800 per workstation, *HelpTrac* offers tremendous value, which you'll discover when you compare *HelpTrac* with other titles offering similar performance.

Quality technical support, of course!

While most of the industry is taking support charges into the stratosphere, *HelpTrac* has a down-to-earth technical support policy. Your first 90 days of support is free, and by enrolling in the annual Upgrade and Support Program you get unlimited technical support and automatic free updates to your software at no additional charge.

Useful reporting

HelpTrac for Windows is compatible with *Crystal Reports Report Writer* and *Report Designer*. Over fifty useful reports are already included, and you can easily create your own custom reports.

The included reports provide you with critical information to help you answer such questions as:

- Which products are causing the most problems?
- Who is really solving the problems?
- Are you adequately staffed?
- When are the calls coming into the Help Desks? (And what are the peak load times?)
- Which equipment needs preventative maintenance?
- How much time is being spent supporting each product?
- Which symptoms occur most frequently for a given product?
- Which users are having problems with particular products? (Training issue.)
- Which technicians take longest to solve various types of problems? (Training issue.)
- Which problems take the most time to solve?
- How much time is being spent supporting each department?

Reports are meant to help you manage your operation—they should be relevant and easy to read.

HelpTrac now also has presentation-style graphing capability—very useful for presenting results and trends to executive management!

Priority escalation

The software must allow for flexible priority assignment. With *HelpTrac*, each problem ticket is assigned a priority level by the technician. Every priority level then has a set number of days before it is considered past due. This kind of aging strategy assures that even the everyday requests for information don't fall through the cracks. It also ensures that new, critical items take precedence over an older, low-priority item.

Wide network support and platform flexibility

Make sure that the software works with your network. *HelpTrac* supports virtually all networks: NetWare, Banyan Vines, Lantastic, Windows for Workgroups, and most other networks. This ensures its compatibility with *your* existing network system. It's also important that your software not limit you to a single operating system. *HelpTrac* is compatible with Windows 3.1, Windows 95 and NT.

Security features

A quality Help Desk software package should include security features to control access at the individual technician level. *HelpTrac* provides multi-level security features and an option to activate "Tight" security.

Diagnostic tools

Make sure that your help desk software can communicate with your network diagnostic program, so your help desk technicians are informed of problems.

Some vendors have tried to incorporate network diagnostics tool within the help desk software itself, but we've decided not to take that approach. The *HelpTrac* philosophy has been—and continues to be—to build and maintain the best help desk software available, and recommends against using a do-it-all package. We can, however, recommend (and integrate with) several excellent diagnostic packages.

Pagers

If your Help Desk technicians carry digital or alpha-numeric pagers, *HelpTrac* can notify them -- at the touch of a button -- that they have a new request for help. This allows the technicians to stay in touch with urgent calls while still moving around the company, working one-on-one with users and solving problems.

Supports VIM, MHS and MAPI e-mail protocols.

Support for E-mail systems

The HelpTrac e-mail features add long-asked-for functionality to the package, allowing Help Desk technicians and their users to communicate via MS-Exchange/MS-Mail, cc:Mail, Lotus Notes or any communications software supporting VIM, MHS or MAPI messaging protocols. This not only allows technicians to send reports and results to users' electronic mailboxes, but also allows users to send requests and questions to the technicians just as easily.

Knowledge base options

A critical component of the Help Desk package is the “knowledge base”, the database containing any information that might offer clues to solving the problems encountered. There are three levels at which this is handled in HelpTrac:

Basic - Search the existing file of problem reports or trouble tickets; uses keyword or topic search. (All packages do this.)

Moderate - Dynamically build a separate information base, either automatically or through manual annotations (HelpTrac automatically accumulates the information and lets you annotate.)

Extensive - Integration with an external knowledge base, i.e. an accumulation of technical documents provided by hardware/software vendors. Can be very expensive. HelpTrac has the capability of linking to these files, but we recommend caution—some of these tend to be shallow and not all that useful. Choose carefully (we'd be happy to advise you).

Help Desk support essentials

Now that you've decided what hardware and software to use in your Help Desk, how do you efficiently run the department?

Hours of operation

Remember that keeping your Help Desk operating during extended hours costs you more than simply staffing the department during 9-5. If your customers or employees expect your Help Desk to be open 24 hours a day, 7 days a week, then prepare to meet the overhead requirements necessary to staff the department at all times. By tracking your peak calling times, however, you'll be able to optimize your staffing levels and not overstaff during non-peak hours.

Analyzing the performance of Help Desk technicians

HelpTrac provides you with information about the number of calls handled by each of your Help Desk technicians, showing you which technicians are handling the most calls. Keep in mind that your

technicians will tend to *specialize* in handling certain kinds of problems. One person, for example, might be the database expert -- and all database questions may get referred to her. So when you compare the number of trouble tickets handled, be sure to consider the *type* of trouble tickets as well.

Define your support objectives

As we mentioned earlier, this should be settled right up front: what are your objectives in establishing a Help Desk? And how will you know when you are meeting those objectives?

What are your concrete objectives in establishing a Help Desk?

List the Objectives

To start, write down your own reasons for doing this. Ask yourself, "What's important to me about having a Help Desk department?"

Then, when you get your answer, ask yourself again, "What's important about that?"

These two answers will probably help you understand your own reasons for having a Help Desk. Common answers are:

- "I want to be able to keep my customers happy."
- "I want to reduce product returns through better support."
- "I want to keep our employees working productively."
- "I want to solve support problems early, before they become disasters."
- "I want to increase the productivity of my customers."
- "I want to keep problems from slipping through the cracks."

These are all good reasons for supporting a Help Desk department. However, in defining your objectives, it's often more beneficial to state them as clearly as possible in numbers. Such as:

- "I want to reduce the number of product returns by 25%."
- "I want to increase our per-employee annual productivity to \$200,000."
- "I want to double the number of non-solicited compliments from our customers."

Use a graph to visually analyze your Help Desk effectiveness.

Track Your Progress on Your Objectives

Once you establish your goals in running a Help Desk, continue to pursue those goals by tracking the actual results. Whether you do this the simple way (on a whiteboard or by just writing it down on paper) or the high-tech way (feeding it all into a spreadsheet and graphing the results on a weekly basis), make sure you have an idea -- at all times -- about how close you are to achieving the objectives you've set out for your Help Desk.

Stay on target!

Handling calls

All technical support technicians should be seated at their workstations, wearing telephone headsets. HelpTrac should be loaded and ready to go.

Once a call comes in, any available guru can take it. The first question is, "Hi, this is Brad at the Help Desk. May I have your name please?"

Once the caller provides their name, Brad should immediately enter the full or partial name and do a record search. If the person has ever called before, their record will appear.

"Okay. You had the problem with Microsoft Excel. How is it working now?" -- just to go over the previous problem.

Normally, at this point, the person will describe their new problem. As the technician listens to the problem, they should be navigating the interface to enter the problem ticket. By the time the conversation is finished, the problem ticket should be nearly finished. When your gurus are first learning *HelpTrac*, they may have to ask the caller to wait from time to time, but this will quickly disappear as your gurus become more efficient at operating the software.

Once the call is finished and the trouble ticket is entered, the guru should either get right into solving the problem or pass the problem on to the correct person who can handle it.

Remember: Look for solutions to similar problems!

Make sure they have the appropriate skills

One common complaint about telephone support is that the support people are under-skilled and unable to find solutions to all the problems. This is often based on a misperception by the caller -- it's impossible for any help desk technician to know the answer to *every* problem.

However, some technicians are certainly performing at less-than-peak performance due to their lack of skills. What kind of skills are necessary for a competent Help Desk technician? Here are a few:

- The ability to quickly gain the trust of the caller

It's impossible for any help desk technician to know the answer to every problem.

- The ability to quickly discover the actual problem by listening to the caller's description of the problem
- The ability to pronounce words clearly and explain steps and solutions in clear, concise language
- The ability to handle angry or frustrated callers while maintaining a high degree of professionalism
- The ability to handle enormous amounts of stress for long periods of time
- The ability to simultaneously speak with the caller while navigating the Help Desk software and entering information

Providing incentives

As we mentioned earlier, technical support has frequently been positioned on a low rung of the corporate ladder, with no discernable career path. The good people left (or were burned out) and average experience levels remained low.

This creates an atmosphere without incentive to excel. Therefore, a good Help Desk manager will create rewards for their Help Desk technicians who consistently perform well and solve problems while leaving customers happy and positive.

Important: Judging a technician's "efficiency" by looking at the number of calls they handle during the day is not a good way to judge their actual contribution to your company. Why? Because once an incentive system is in place that is based on the number of calls handled, technicians have strong interest in getting callers off the phone as quickly as possible. In doing this, they may not actually solve the problem or serve the customer.

A better way to judge the effectiveness of your technicians is:

1. Observe their phone conversations and judge them according to an objective list of goals such as, "Ability to gain the trust of the caller, ability to explain the solution clearly," etc.
2. Get feedback from the actual callers on how their call was handled. Use this to track the effectiveness of each technician.

Once you know who is providing the best support, reward them with highly-visible, valuable incentives such as cash bonuses, conferences or training (of their own choosing), really good gifts, etc. above and beyond the normal performance salary increase.

Remember to provide adequate training to your support staff.

Support your help desk

Remember, too, that your Help Desk itself needs support! Be sure to provide appropriate training to all the staff. One common mistake made by Help Desk managers is to scold technicians when **they** ask for help. Often, though, this is simply due to their lack of training and a desire to learn more.

In the big scheme of things, remember to keep the Help Desk technicians trained and informed about changes in your products (or new products), and they will naturally be able to better help your customers or employees!

Here are seven critical skills you can consider training for:

- **Telephone skills:** handling complaints while promoting calm, rational approaches to problem solving.
- **Speaking skills (voice control):** the technician must control their voice quality (pitch and intonation) and speaking speed. A speaking rate of approximately 120 - 130 words per minute is generally considered pleasing.
- **Customer relations:** promoting and working within the concept that, "The customer is always right." The ability to pass on your company's values and professionalism through conversations with customers. Being able to quickly gain rapport with the caller in order to establish trust.
- **Stress management:** how to effectively deal with the pressures of constant, tedious Help Desk work.
- **Time management:** using not only their own time effectively, but also paying close attention to how they use the caller's time in solving the problem.
- **Typing:** better typing makes them more efficient in all Help Desk tasks
- **Problem-solving:** creative, constructive thinking for a variety of problems

Rating the productivity of your Help Desk

How do you measure the overall effectiveness and productivity of your Help Desk? Here are a few of the many ways:

Number of calls answered in a day

Track the number of calls coming through the department each day, then calculate an average number of calls per technician. This gives you a very rough -- yet somewhat useful -- picture of the effectiveness of your Help Desk. However, it's certainly one of the least accurate methods for judging

the true effectiveness from the perspective of your customers or employees.

Number of minutes on hold

With the right system, you will be able to track the average number of minutes each caller is on hold before a technician takes their call. While this gives you strong data on the "front end" satisfaction of your callers, it gives no indication about the quality of the solution offered by your Help Desk technician. Still, many well-run Help Desk departments have a large display visible to all technicians that shows the average number of minutes callers spend waiting.

Number of minutes taken to answer the question / solve the problem

As we mentioned previously, you can also rate the productivity on a per-technician basis by monitoring the number of minutes (on average) they need to answer a question or solve a problem. This is a fair indicator of productivity, yet it also has the effect of giving technicians incentives to "rush" the callers off the phone as quickly as possible. And this, in turn, may actually result in more calls about the same problem!

Number of calls forwarded outside the department

How many calls does the department as a whole forward to another department for an answer? If this number is on the rise, it's probably an indication that your technicians need additional training.

Discovering patterns with reports

HelpTrac lets you analyze potential training alerts on a per-employee basis.

Identifying "high-maintenance" customers

One of the key benefits of using a software package as advanced as HelpTrac is that it allows you to analyze the trouble-ticket load on a per-employee basis. This allows you to quickly identify the employees who are asking the most questions.

Often, you can save time and effort by providing this employee with additional training -- perhaps inside the company or outside -- to help them "catch up" with the technical knowledge of the other employees.

You may also wish to identify a *group* of employees who ask the most questions and offer them *in-company training* for an hour a week or so. You may then track the results of your training by comparing the number-of-calls reports on a weekly basis!

For more details on training, see the next section.

Identifying troublesome software or hardware

Some of the "magic" of HelpTrac comes from its ability to find and identify troublesome software and hardware. This is a direct result of HelpTrac's superior reporting capabilities.

A "problem software" title will be immediately obvious when you run a "per-product" trouble ticket report. You'll see exactly how many calls you answered as a result of "Microsoft Word" or "Excel," etc. When a particular software product generates a "peak" in the chart, you know there's something wrong. Perhaps it's time to switch software providers. Or maybe you need company-wide training on using the product.

If the calls are "bug-related," it's probably time to talk to the developer!

The same holds true with the hardware. If "brand X" monitors are generating twice the number of calls as "brand Y" monitors -- and assuming you have the same number of each, at the same age -- then it's not hard to decide which brand to buy for the next round of monitors.

This kind of tracking and reporting capability provides you with a *wealth* of useful information about your company and the interaction between the software, the hardware, and your employees.

Identifying less effective Help Desk technicians

Using the same tracking and reporting capabilities, you can also quickly identify a Help Desk technician who needs help! If the people they help tend to call back with the same problem, it's a definite indication of the need for additional training for the technician.

Discovering department trends

This means you can identify *department* trends. You may discover, for example, that one department generates 50% more calls than the average department (per person). This would inspire you to investigate the situation.

Perhaps you'll discover that the department has old software and needs the upgrades that the rest of the company already has. Or perhaps they have bad wiring, resulting in electrical problems. Or maybe the whole department needs some training.

Fixing problems with training

We've mentioned training throughout this report, yet we haven't exactly described how to go about doing it. Here are the key concepts for in-company training.

HelpTrac also allows you to generate reports on a per-department basis.

Training facilities

Firstly, consider your facilities. At a minimum, you'll need a "classroom" setting with a whiteboard or some kind of projection system. However, for more *effective* training, you'll also need computers for your students.

Ideally, a room would consist of ten or twenty computer workstations (one for each student) and one computer for the teacher with some kind of a projection system (or large-screen TV) so the students can see what the teacher is doing with the software.

You may also choose to allow more than one employee to share a workstation.

Who you should train

When you bring in a new operating system or largely-used software package, we recommend training *everybody* on a limited basis (perhaps an early morning seminar).

However, in most situations, you'll be training individuals or small groups of people who need the most training. To decide who needs the training and who doesn't, look at:

1. The average number of trouble tickets generated by this person each month.
2. The permanency of problem resolutions (did they remember the solution, or did they call again about the same problem?).
3. Their willingness to *learn* rather than simply let someone else solve their problems.

If you find a person with problem #3, you have a special situation. Some people don't actually want to learn how to solve their own problems. To them, the computer isn't *their* problem, so they shouldn't be responsible for learning how to use it or solve its problems. They look upon the Help Desk as a "gopher" resource that should solve all their problems and take care of all the computer maintenance tasks automatically (like editing batch files, setting Control Panel items in Windows, etc.).

We suggest that a person like this needs to participate in a serious discussion with management about the role of employees and their computers. Every employee must take *some* responsibility in learning how to effectively use and maintain their computers.

Training department managers

Another method for training departments without actually giving the seminar to each person is to hold trainings for department managers or people in similar positions. The theory is that once these people know how

How to decide who needs additional training.

to use the software, they will be able to teach the people in their department how to use it.

The actual effectiveness of a campaign like this obviously depends highly on how well your managers work with their department personnel. It may be a solid idea or it may simply turn out that all you've done is trained the department heads with no transference whatsoever to the department personnel.

What you should teach

We think that too many seminars on computers spend time with the "theory" of computers. Or, "What's behind the scenes" such as the history of DOS, what's a DLL, what's the big picture of how this should all work together, etc.

Nothing could be more useless to an employee who just wants to know how to change the page orientation for her spreadsheet, for example.

So we recommend that your training consist of 90% *how-to* techniques and real, *hands-on* experience. In other words, you should take them through the exact techniques for changing the page orientation or backing up their hard drive or changing their CONFIG.SYS files, and so on. Remember, people *learn* what people *do*. So let them do it!

However, a few "general" skills are in order -- such as how to install software. Every employee should know a few basic things:

- How to install something in Windows
- How to print and change printing options
- How to run a program
- How to exit a program
- How to save files, open files, etc.
- How to navigate their hard drive and copy, delete, or move files
- How to log in to the network (and log off)
- How to restart the computer after a Windows crash
- How to perform routine maintenance such as Defrag, DiskScan, backing up, etc.
- How to check the available space on your hard drive
- Basic computer terminology and the difference between "Memory" and "Hard Drive Space."

- They should know exactly what kind of computer they have -- what's the processor, the RAM, the hard drive, etc.

Beyond this, the training should be *product specific* such as, "How to share a document using Lotus Notes," etc.

A good way to decide what to train is to investigate which questions are being frequently asked. Then ask yourself:

- Do these questions all relate to a specific product?
- Do these questions relate to a specific *procedure*?
- Do these questions arise from a misunderstanding of some basic system concept?
- Do these questions arise from the lack of training of an individual or group of individuals?
- Do these questions relate to specific *hardware*?

The answers to these questions will give you clues as to what's causing the problems and what kind of training will be the most effective!

When you should train

The catch-all answer is, "Whenever necessary!" However, few companies have the luxury of yanking their employees from their jobs every day for new training.

In reality, you must weigh the **cost** of training vs. the **cost** of not training - and this is where most business owners miss something in their calculation. Remember the time/cost analysis at the beginning of this report? There, we showed how even a few minutes a day in lost productivity could lead to your company losing thousands of dollars a year.

As you decide when to train your employees, keep these formulas in mind. Ideally, they should dictate who you train and how often you train them.

One problem with the formulas, however, is that many of the figures are "fuzzy". How do you get a clear picture of the exact amount of increased productivity your company will realize from doing training?

One way is to test your employees...

Weigh the cost of training vs. the cost of not training.

"Task testing" lets you find out how quickly employees complete a computer task.

Testing your employees

This doesn't mean the old "pencil and paper" test. It's called *task testing*, and it means assigning a computer task to a group of employees and timing exactly how long it takes them to complete the task.

For example, suppose your employees spend a large amount of time creating tables in Microsoft Word. And suppose your Help Desk department gets a lot of calls about how to create these tables. So you decide to do a training.

Never train more than half the employees at once because you need to maintain a *test group* to see the results of your training.

So you set up the "Tables" training and, suppose, spend an afternoon showing ten employees the ins and outs of doing tables in Word.

Once that's finished, design a quick *task-oriented* test for creating tables. It might have four tasks, for example, like this:

1. Create a five-column table in word and fill each cell with numbers.
2. Make the heading of the table say, "Item, Description, Date, Amount, Customer." Make the heading bold.
3. Put a double border around the entire table except for the header, which should be an extra-thick header.
4. Center the table and make the columns no wider than necessary.

Then *time your employees* in doing the task. Test those who have taken the training and those who haven't, then compare the time scores.

Suppose, then, that it takes the non-trained employee 9 minutes to complete the task, but the trained employee does it in only 6 minutes (fairly realistic, right?) So, you know your training saves them 3 minutes each time they create a table.

The **next important question** is, "How many times do they make tables in the normal course of work?" And this is the critical question. The accuracy of your entire analysis depends on this.

For this example, lets say you determine that the average employee creates three tables a week. With training, then, we can figure they would save a total of 9 minutes a week. Multiple that by 50 weeks and you get a time savings of 450 minutes.

So in a year's time, they would "save" 450 minutes from your training.

However, remember that they probably spent 180 minutes or so (three hours) in *taking* the training. So, in the first year, your net savings were only 270 minutes. Still, at \$50 an hour (or more!), that's worth a couple of hundred dollars. Multiply that by all the employees you've trained, and then consider the benefits *after* the first year!

"Self-training" is the process of people getting better without formal training.

Self-training

Of course, there are plenty of other considerations, like, "Self-training." This is the situation where a person gradually gets better at the task over time anyway. Thus, while training may help in the short run, it may not produce amazing productivity results in the long run.

That's why training pays off best when it helps a person complete a certain task in *half* the time or less! To find the best topics for training, consider topics that:

- Are often misunderstood, yet easily explained
- Are repeated with great frequency
- Widely affect the majority of employees
- Easily extrapolate to help solve related problems

Best actual training times

The best time of the day to train is the morning. We recommend starting your seminar at 8:00 am and going through 12:00. The morning hours seem to produce more alert students!

Day of the week: We recommend Tuesday, Wednesday or Thursday morning. Monday is bad because of the "weekend recovery" and Friday is bad because of "weekend anticipation."

Time to Get Started!

Okay, so now you know how to get your Help Desk started, what hardware to use, what software to use, and how to monitor the effectiveness of your training and Help Desk technicians!

The next step is to simply make the decision to start your Help Desk and contact us to find out how you can get the very best software for your Help Desk department – *HelpTrac*.

As you read this booklet, did you find yourself picturing all the ways in which HelpTrac can benefit you? Many of those features you saw are only available in Help Desk products costing up to *ten times* what HelpTrac costs! And as you begin to realize the value of HelpTrac now, you might want to get more information about it. So call us here at Monarch Bay Software, Inc. at 1-800-450-6250 or 713-450-2800 right now and request your working demo of HelpTrac. We'll send it to you at no charge.

We're also happy to include testimonials and user success stories about some of the many companies that are saving hundreds of thousands of dollars a year by using HelpTrac in their Help Desk departments.

Train during the mornings for alert students!

Just call us for more information. In the mean time, we wish you the best in your own Help Desk!