

Outsource This!

Broaden Support and Reduce Staff Burnout

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ABSTRACT

With constricting resources, rising service expectations, and burnt-out Tier 1 staff, support services face the question, “How can we do more with less and remain effective?” This session covers Colgate’s process of outsourcing tier 1 support viewed from multiple perspectives (the idea stage, implementation, and evaluation).

Universities today have increasingly complex infrastructure systems with a growing client expectation and shrinking budgets. The Help Desk Professional staff is under increased pressure and is easily burnt out. Clients experience dissatisfaction with the timeliness and quality of support; technical advances in the curriculum are underserved and needs analysis undone.

Administrators have been forced to take an honest, hard look at available or planned resources and make tough decisions. Should you continue in crisis mode, drastically lower client expectations for support, or risk innovative solutions to leverage available resources? Colgate decided to try an innovative new way to meet demand. We developed an outsourced partnership to provide greatly expanded (off-site) Tier 1 client support while dedicating local professional staff to more complex (Tier 2/3) support and needs analysis consultation for University divisions. This paper will explain the process we used to get where we are today as well as lessons learned along the way.

Categories and Subject Descriptors

K.6.1 Management of Computing and Information Systems: Project and People Management: Staffing

General Terms

Outsource Tier 1 Support. Blended Support Model

Keywords

Outsource, Helpdesk, Tier 1 Support, innovative, blended support, rising expectations, burn out, budget restraints

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1. INTRODUCTION

I plan to give an overview of our experience with outsourcing Colgate’s IT Help Desk Tier 1 Support. My goal is to include several different perspectives on our goals and experiences and try to represent the overall tone. I will cover from the idea stage through implementation and our ongoing adjustments to improve and blend together an off and on-campus solution for our end-users.

First, I will give you some more background about Colgate’s IT department and the problems we were facing before deciding to outsource. Second, I will tell you how we went about gathering information to identify new Help Desk candidates. Third I will describe our expectations at the beginning of the project, which determined how we would go about the selection process. Then I will move on to implementation. Fourth, I will tell you about the rollover to the new Help Desk, including how we prepared the new service for rollover. Fifth, I will discuss some of the discoveries and changes we made as we refined our model. I will assess, as best as I can, how successful we were in reaching our goals and what we learned from the project. Finally, I will talk about what lessons we learned.

2. OUR OUTSOURCING TIER 1 EXPERIENCE

In spring 2002, our Helpline provided technology support over the phone and via email to faculty and staff. We also provided troubleshooting and system support in person (usually at the person’s desk).

Our team included one Hardware Repair Technician, three Helpline Support Analysts as well as a three 1/2 Technology Support Analysts (TSA’s). One of the TSA’s doubled as a Helpline Support Specialist part time. Two Installers and one Director rounded out the team. The TSA role probably needs the most explanation – TSAs were full-time IT staff working as a liaison to their specific academic divisions in addition to rotating shifts on the Helpline. TSAs provided long-range planning, specialized curricular support, and worked closely with the installation team on upgrades in their division.

We did not have any TSAs for administrative support, although numerous methods were attempted over the years. Staff support was handled solely by the Helpline. Our student support was handled separately. Students supported students with a Helpline staffed by their peers.

Users' Perspective

Our users have high expectations due to a history of fast, personal service. Our new CIO was hearing that those expectations were not being met like they used to be. Additionally, faculty were feeling increased pressure to continue teaching beyond the classroom by providing class web sites, using Blackboard for discussions, etc. Likewise, our administrators were expected to use technology in new and different ways, and their work schedules were being extended beyond the normal 8 a.m. to 5:00 p.m.. What we had was good, but users needed extended phone support hours and faster response times. What they wanted was 24/7 support, and we struggled to keep up with the 5/8 support model we had.

Our Team's Perspective

Our success became our enemy; our users' expectations were very high because we had delivered fast, personal, quality service. ITS had made efforts to push technology and the Colgate community began responding and embracing it. With more users tapping into our limited resources, we were constantly playing catch-up. We got to the point where the Helpline found it difficult to keep up with day-to-day demands, let alone research new solutions to higher level problems or projects. There was increasing pressure from staff and faculty to support home computers because the end-user was being required to work from home to check email, class discussions, etc. The end-users' jobs were becoming more of a 24/7 access job and that was pushing the demand on us to provide 24/7 support in an existing 5/8 support model.

CIO's Perspective

Our new CIO was hearing many sides of the story from users and administrators, as well as from IT staff. He was hearing from the users that expectations were not being met. He was hearing from the Helpline that they were overwhelmed. At the same time he saw the strategic importance of augmenting existing strengths in advanced classroom technology, networking, and web development. With the limited possibility of adding new positions, given the shrinking budgets, there were only a few options for how to proceed. His dilemma was to find a way to add more staff to these key areas without hiring more people. He assessed the strengths of all the current ITS staff and looked at the then largest team (Desktop Support Team, which included the Helpline) and decided to reorganize and shift staff from there to other teams. Then he had to address the problem of finding a way to fill in the gap left in the Helpline and address the issues of high burnout and low morale due to the growing workload. He could not use student assistants for Helpdesk because of the security environment (remote desktop control and portal, one password needed for all systems), so he came up with outsourcing the frontline support.

CIO's Decision/Benefit

The idea to outsource was presented to ITS in November 2002 as part of a larger reorganization project. By outsourcing he could gain economies of scale and increase hours (lunch, evening, weekends) beyond our normal 5/8. He could reduce staff burnout by getting the staff off the frontline phone and out to the users desk to fix problems face to face. He was able to add staff without long-term commitment or benefits.

Our Team's Reaction

Many on the team worried about job security. After all, if they can outsource this, why not eventually outsource all of IT? Some staff moved to other departments within ITS as part of the reorganization. The Helpline was excited about the possibility of getting to focus on higher level support. They looked forward to more job satisfaction, professional development, and not being inundated with mundane repetitive questions.

The TSAs worried about losing their autonomy – they had a lot of freedom with their workflow and schedule and feared losing it. They saw the TSA role as very successful and worried the one-on-one relationship would be compromised.

User's Reaction

The end user was not involved heavily at this point. When they were informed via email of the decision, reactions were mixed. Some liked the idea of extended hours. Others worried about losing “personal” service. Some thought, “How could someone in Prince Edward Island know my situation and the individual needs you have always handled for me right here?”

Gathering Information

The next phase of the project was to gather information about what is out there for outsourcing. For this phase, Colgate hired a consultant, John Stinson from Onset Consulting Group. This was one of the most important decisions we made for several reasons.

First, I have already said, one of the biggest problems our ITS department had was that we were already overwhelmed by the existing workload. Giving any team or individual the responsibility to research this high priority, far-reaching project would have been a mistake. By hiring an outside consultant, we essentially purchased the time and unbiased opinion of a third party, which made all the difference at this crucial stage in the game.

Essentially what John did was talk with Colgate's CIO as well as the then Director of the Desktop Support Team, and found out what we were looking for and what type of call volume our current Helpline received, etc. He then researched call centers on the internet and began calling different companies to get an idea of how they are organized, and what differentiates types of call centers. He found that there are numerous distinctions. Some of these structures are:

- General call centers vs. ones oriented toward technical support

- Pooled vs. dedicated support

- Branded vs. non-branded support

Some companies offer skills based routing, email and chat based support and 24/7 support and custom application support. Access to their real-time web-based call management systems is another service we were interested in. This allowed us to facilitate call escalations. Real-time reporting and assessment were other options.

John advised us to watch out for virtual call centers and told us to be sure to ask to visit the site and request access to the call

management system, which he did. He felt it was very important that they let you visit their facility.

Through the process, he was assessing what would fit our needs. After calling and gathering all of this information, John visited several call centers and narrowed the search down to four vendors: Advantage Communications, PC Helps, Nexus, and Intellimark

We received information from the consultant as well as the vendors themselves. ITS decided to invite all four companies to campus to give us a presentation and describe their services. Invitations went out to the campus community in general and we specifically targeted power users and others with a vested interest in the decision. In preparation of the campus visits, the Helpline prepared an extensive list of questions and topics we hoped to use as a means to compare the vendors.

Turnout at the meetings was not quite what we had hoped. There were only about five or six people outside of ITS who attended most of the presentations. Several ITS staff other than our team also attended. An open invitation to the selection meeting was extended to anyone who had come to the presentations. For different reasons, we decided two vendors were not what we were looking for. We stated that we could live with either of the two remaining vendors. From there, the decision was up to the CIO, who selected Advantage Communications as our vendor after he completed price negotiation.

Initial Expectations

We expected a certain amount of ramp-up time when the outsourced help desk would become familiar with Colgate's procedures, resources, and culture. This time would be measured in weeks or perhaps a few months. We anticipated the outsourced help desk would handle an average of 60% of the calls in the long run. If this happened, it would result in freeing up much of the former Helpline staff's time, allowing for the movement of some staff to other teams within ITS. We expected there would not be any Helpline staff members who would be tied to a phone. Staff who used to be tied to the phone would be able to focus on research and projects and to structure their workdays, which was expected to alleviate symptoms of burnout.

Implementation

We began implementation in late January 2003 when we did the switchover to outsourcing. Before we switched over we devoted three Helpline staff several days time (in half-day blocks) to document and transfer information on our systems, procedures, policies and resources. We put together a booklet as well as an electronic format copy for the outsource company to have in order to help teach them about our environment and our resources.

We also created an escalation strategy. We used one "Point Person" on a dedicated hotline (this person was always there). This person was responsible for getting all the escalated calls and facilitating the resolution of those calls. We also had a second person "On Call" who was out in the field working on their own calls - and that person was supposed to plan their day with the idea that they could be called away to fix a downed machine if need be. The "Point Person" would call the "On-Call Person" to go out on emergencies. The Point Person never was out of phone

reach. This person handled all the other calls that came in and took ownership of those calls to facilitate their resolution.

We implemented an emergency call line for the outsourced company (Advantage) to reach us (Level 2) to escalate emergencies. This way if a machine was down, they would call us directly as well as escalate the call to us electronically. This protected us so we would know there was a machine down if we were working on something else in the office. We used this same phone line as a means for Advantage to call the "Point Person" to get information if they did not know how to handle or answer a call. In many cases, we could give them the information over the phone and they could complete the call. As time goes by, they are calling less and less as they learn more about our environment. Today very few calls come in from them with questions for us.

You will remember we chose outsourcing as part of our reorganization. This in itself added more complex issues for us to deal with. People were moving from our team to different teams and much time was spent on communicating and trying to figure out who was doing what and how. This process took a long time and was very important. We needed to iron out the issues. Most of us who have worked in IT have been through this several times and realize how much time this takes.

Advantage has solved an average of 63% of all the software related calls and 29% of the hardware calls. We expected that most hardware calls would be handled on campus. Advantage solved 56% of all calls overall (including hardware).

We were able to expand our Help Desk hours with the outsourcing model. They used to be 8:00 a.m. through 4:00 p.m. Monday through Friday and closed during lunch. Our new hours are 7:00 a.m. through 7:00 p.m. Monday through Friday and 6:00 p.m. through 10 p.m. Sunday.

Reality Is

We learned perhaps our initial expectation of 60% was unrealistic. The time it took for Advantage to ramp-up was underestimated. Our environment is very complex and not as straightforward as an ISP's might be. We get all types of questions - from soup to nuts.

We thought we would have more training time with Advantage prior to the rollout. We hoped for an on-site visit at both locations, showing each other how things worked at Colgate and at Advantage.

We did communicate to the community, however many people were not aware of the change even though we communicated via campus-wide email. The timing of our communication was between semesters and the change happened just after the start of the semester. Much of the faculty did not notice.

We really did not realize our Help Desk was much more than a Level 1 Help Desk. We realized we did a lot more than we thought. We had a misconception of how many of our calls others could answer. They will not be able to have the breadth of knowledge an on-site person would have to solve certain non-standard questions. There is often times a non-technical and sometimes political, aspect to even the simplest technical question.

As we just described, we still had one staff member tied to phones at most times. That person was under less pressure because when

we were on the phones, we could still attend all staff meetings or training and only receive emergency calls during those times. The rest of any calls that were escalated could wait until we returned to our desk.

Keep it Simple

Our assessment is anyone attempting to outsource should keep it simple. Making this change to outsource is big enough without adding more change at the same time. Colgate did many things at once, and as a result it was very hard to know how successful any one change was or what its effect was.

We had budget constraints at the end of the budget cycle shortly after outsourcing, forcing us to stop our hardware upgrade/replacement schedule. At the same time, Colgate decided to start a strategic partnership with a new hardware vendor. When the go-ahead was approved to purchase again, we started an evaluation and assessment process of these vendors. This process was very time consuming and caused our hardware/software replacement cycle to fall even further behind. We hoped the change would prove to be worthwhile. This was just one more change that caught us all off-balance and caused a great deal of discussion and anxiety.

If those were not enough variables to make it difficult to determine how successful we were with this project, we had more. The beginning of the new school year, which is generally rocky to begin with, brought with it another whole set of variables. We lost a staff member to a family situation that caused her to move. We, and everybody else, had viruses and saturation of the network as a result of them. Printing problems increased because of the viruses and slow network.

Life was not stressful enough that we sub-netted our flat network, added forced MAC address registration through Cisco's Secure User Registration Tool (URT), began to push critical updates to Colgate owned Windows machines, and pushed automatic virus updates and scans in the middle of the year in order to combat the network saturation.

Our new support model was not able to handle the volume of calls the viruses generated. Our outsource vendor was supposed to be able to add more people as needed. The problem was that all our vendor's clients were getting high call volumes because everyone was getting hit with this problem. It was an industry-wide problem, and there just were not enough bodies to go around. As a direct result, we had a high level of abandoned calls and long hold times for people trying to get through to the Helpline.

The usual increased traffic of getting new faculty up and running for the new semester was slowed down because of all the virus emergencies, and the TSAs were not able to assist as they were accustomed to. We needed to reset expectations. Let us pray none of us have another year like that.

Database Issues

Advantage had their own database, and the plan was to work out of their database. We found their database more difficult to use than our own homegrown system.

Some of the problems we found were that it was hard to navigate and hard to see our priorities and we needed to add queues to manage our tickets. We were used to doing full text searches and

we were no longer able to. We worked with the vendor to get the queues more manageable, and they are much better now. We still cannot do full-text searches.

Our homegrown database was also used to track parts, inventory and shipping and maintain a chain of custody when machines were brought in for service. We found if we needed a part or to track a chain of custody, we needed to enter another call in our internal system. This was time consuming and problematic to manage our calls out of two databases. This still remains an unsolved problem for our hardware technician, who tracks a lot of parts and repairs.

Not all of ITS used the database and we found if the ticket was escalated to us and our team was not the team to resolve the issue, we were adding an additional layer to the resolution by being a middle man. This takes time, and Colgate was paying highly technical people to do clerical work. We were essentially taking the call and escalating it to the appropriate person and then taking it back from the appropriate person and contacting the end user. This results in a much longer time to resolution and a very frustrated Level-2 Support person having to handle the handoff instead of doing technical things. We have worked to find ways to reduce this middle man problem and have the call go directly to appropriate people to begin with. Guidelines were set, and now we are not in the middle anymore. Decisions were made on what can go directly to another team and what we needed to check on first before it was handed off.

Dispatcher introduced

The original goal was to remove us from the phones and stop being a middleman. We still had a person dedicated to watching for the escalated calls and assigning them to people or taking the call and handling it themselves. This was time consuming and wasteful. We tried using a temporary student intern to be the person by the phone and manage assigning the calls. This did not work well, and we have shifted the responsibility to another team in IT, which has people who are working on the frontline in a similar capacity (media services). Their desk always has someone at it, and they began to listen for the phone and assigned calls appropriately when they came in. This has worked well. Now we have one person each day designated the On Call person who plans to be able to run for an emergency, and the dispatcher know where they are at all times. The rest of the calls they assign appropriately.

What Did We Learn?

If we had it to do over again, the biggest thing we would change is not make so many changes at once. Make only one change at a time. We would have a dedicated person managing the communication and training, resolving issues and finding ways to streamline the process. This is a very big job, but very much worth it.

ITS is good about including our team when we are rolling out new things like our new portal, but not very good at keeping the Outsourced vendor informed. We need to keep them more informed at earlier stages of planning changes and testing.

Regular meetings with the vendor should be scheduled. Our first was scheduled at six months after rollout. We should be talking with them on a weekly or biweekly basis. Periodically we should

meet with those who are answering the phones and in the trenches as well as their supervisor. We had one person from Advantage do an on-campus visit last summer. That should have been done much sooner. We should have others take turns coming to get a feel for the campus and the people. Preferably this should have happened before rollout. Political and environmental knowledge of on-site staff cannot be easily duplicated by an off-site team.

Reducing the middleman is a really big piece we should have done at the very beginning. Start the process with emphasis on removing the middleman to begin with. The goal is to have quick resolution and fewer people involved in that resolution process.

If at all possible, avoid removing excess staff until things stabilize. Again, we had too many changes to really know what worked or did not.

Build in your contract for follow up on open calls where the end user was expected to call back and did not. These calls hung out there, and if the end user did not call back they were still open. We now have a procedure for these that keeps the open calls down.

Advantage could not really know what to expect – nor could we. There were only a couple of colleges doing this type of blended support model, so we really were on fairly new ground for both the vendor and ourselves. How could we anticipate what to expect? They want to tap more into this market and are willing to work with us to work out the issues. They are learning from us. Some of the changes we have had them make for our queue management will help other clients they have- They have responded to our changes and suggestions. This was a new market for them.

What did we do right?

We outsourced our consultant in the very beginning. We were already too busy getting ready for the outsourcing, as well as dealing with the reorganization. One of the reasons you are outsourcing is you do not have the time. Have the consultant do the legwork. We may never have got where we are today if we did not do this. Our consultant did a lot of very important legwork.

We put the time into preparing written materials of how we work, resources, where to get help or documentation, policies, etc. Colgate did not have these resources developed prior to this.

The CIO gave top-down support to stop the backdoor requests for help. He was adamant all calls go through the Helpline and stood behind us when users tried to use alternate means to request help.

We included email and a web form as part of our outsource package. Our users can email or fill out a web form to log a call. Many of our users like this. We automated a web form call for a specific type of call to go directly to the correct person. In some cases, this even bypasses the Helpline and gets the ticket resolved even faster because there is not a middleman.

Did We Reach our Goal?

We have not completed a customer satisfaction survey but one is being planned. I hope to have those results with me when I present this paper.

We did not reduce stress on the staff at first, mostly because we changed too many things at once in addition to the unusual year we had. The last semester has been more normal, and we have made enough changes that I can honestly say we have reduced the stress on the staff. We continue to work to improve this.

Did we achieve better/quicker service? Hopefully that will be answered by our survey. Now that much of the administrative changes are done, and we are catching up from the backlog, we are hoping the answer will be yes.

Would we go back? I do not think we would or could.

3. ACKNOWLEDGMENTS

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