Training… A Key to Better Help Desk Consultants

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ABSTRACT
The quality of student consultants and their development through training and education are major factors in determining long-term effectiveness of university Help Desk. To hire and retain good student consultants, it is good policy to invest in the development of their skills, so they can increase their productivity and obtain real-world work experience as IT Professionals.

We would like to share with our colleagues the evolution of our consultant training procedures, from "train yourselves" to a formal, systematic training program:

- First day of work orientation – introducing each new consultant to the department as a whole, each department and an overview of how the Help Desk and its consultants fit.
- One-on-one training on specific applications.
- Self-Paced learning (Handbooks at each station with flow charts and step by step instructions on how to handle specific situations, Web resources (on-line documentation on supported software packages, University Policies and Procedures, and CD-ROM-based containing tutorials).
- One-Day Training sessions which include:
    - Guest speakers on specific topics (i.e. Customer Service, Handling Difficult Customers, Troubleshooting)
    - Role Playing scenarios of common service issues and areas of confusion
- Rotational Cross-Training among various teams, part of on-going training for all consultants.
- Lab training, for the experienced consultants.

After their training sessions, consultants are given an online test. The results help us determine if each trainee has learned the required knowledge to become an effective help desk consultant, or if they require additional training and reinforcement of the skills. This is an ongoing process, which helps us maximize training and meet the training goals for each consultant.

1. INTRODUCTION
The Office of Information Technology (OIT) Help Desk at the University of Maryland, Baltimore County is staffed by a combination of full-time professionals and part-time students. In this presentation for SIGUCS, we will be describing our policies and procedures for the part-time student staffing model.

We know that at most other university help desks, the use of part-time students does not seem to be the preferred model. We have been told that it doesn't work. Their experience and conventional wisdom posits that there is too much staff turnover, that the students are not committed to the Help Desk, that students are not truly interested in the job and on a general basis, students are more difficult employees to supervise than full-time professionals.

Although we consider that each of the reasons given for not working with the part-time student can be valid, our experience has been that the benefits can out weigh the disadvantages. We have taken it upon ourselves to become a part of the learning and development process for the students hired at the OIT department. By working closely with each student employee, we provide them with custom training, help them learn a positive sense of work ethics, and help them develop a career path. We also provide them with ongoing helpdesk training, performance reviews, and development plans to further their career path. This career path is intended to provide job promotion within our department, as well as provide experience that will benefit the student employee after he or she graduates and seeks a full-time job outside the university. Many of our own full time staff, in all areas of OIT, are former student employees either in the helpdesk or other divisions of the department; we fully believe in growing our own.

2. HIRING
In the past, student candidates for the Help Desk UMBC were generally Computer Science and Information Systems majors, "techies". Their communication skills may have been lacking. Nobody cared. They were most likely Unix junkies, or wrote e-mail notes in Pascal as their own coded language.

Currently our student consultant candidates come from every major on campus, although most are Computer Science or Information Systems majors. We have found that we hire generalists instead of specialists, although we look for a minor specialty to develop during their career here. We have found that a computer user who has the interest to develop a specialty generally has the aptitude and capability to pick up additional technical concepts. Our ideal candidate is an experienced computer user who can get around a computer, write and print out a document, make a basic spreadsheet, or write a simple program, but who also seems to have enough ability to think on their feet and who can learn to become an efficient, troubleshooting Help Desk Consultant.

Therefore our hiring process is as in-depth as many in the business world. During the first interview we assess the candidate's grooming, demeanor, communication skills, and experience (including school, work and volunteer). We then contact their references. The second interview focuses on the applicant's actual computer skills; the interviewer tests the applicant's expressed knowledge, looking for exaggerations of their self-assessment. (An overview of technical questions asked the candidates is attached at the end of this presentation) We are working with other UMBC departments in sharing reference information on employees and applicants, and are receiving positive feedback on the efficacy of our program.

3. NEW EMPLOYEE ORIENTATION

In attempting to develop a sense of community among our student employees, we give them an overview of the entire OIT department, describing the functions of each section. During this departmental orientation, the new consultant learns about our career path. The career path, as envisioned, is not limited to the Help Desk. It is expected that the consultants who have the aptitude and the spark for an in-depth specialty will grow in that specialty and will then be promoted to another departmental section where they will continue to develop their skills.

Once we cover the benefits to the student for working for us, we cover our employee expectations, including the basic responsibilities of punctuality, reliability, integrity, and dependability. We define our expectations as applicable to other work places, and attempt to help each of our consultants recognize the value of learning these lessons of professionalism.

Currently we use a convoluted system of timesheets and hours worked documentation. Each consultant manually signs in and out. At the end of the pay period, they enter their hours worked into a Unix program that prints out a neat representation of their hours worked. If we allowed the consultants to enter their scheduled hours, instead of the hours worked, we would have no problems. But they are to enter their hours rounded to the nearest quarter hour, even if their arrival time was not. The ultimate lesson covered regarding timesheets and sign in procedures is that if they arrive on time, life is simpler, on all possible accounts. Again, a lesson is taught in the responsibility demanded of a professional.

We have developed a handbook that not only documents all of the above, but also covers emergency procedures that cover a variety of situations, including inclement weather policies to handling difficult customers. We give the handbook to all new employees on their first day of work.

4. PROFESSIONALISM

Professionalism is the operative word at our Help Desk. Although some may be skeptical, the level of professionalism at our student run Help Desk is increasing.

We accomplish this through ongoing feedback to consultants, praising them for professional accomplishments and learning, and helping them to correct and improve their conduct in weak areas.

Professionalism covers all aspects of our interaction with students, faculty and staff at UMBC, from customer service, to telephone etiquette, and efficient troubleshooting of a customer's problem. Professionalism encompasses the choice of words, clothing, body language and personal habits. We instill upon our consultants that their professionalism becomes the barometer by which the world judges them at first contact, fairly or unfairly.

Although the various aspects of professionalism are discussed, we acknowledge that in many instances, the awareness of the issue is more realistic than compliance, for example dress or specific grooming standards. Like their academic lessons, our focus on professionalism is for their entire life, not merely their time here at the University; professionalism is a process.

5. TRAINING

Initial consultant training is in a classroom setting. The first day covers orientation, communication, customer service, and general administrative issues of schedules, schedule changes, pay periods and timesheets. At this time the handbook is distributed and discussed. In addition, the definitions of customers, customer service and who and what a consultant is and what they do is discussed.

During the next training session customer service skits are performed as well as audio clips of some challenging "real life" Help Desk calls. Analysis of the performance of each character, but most specifically the consultant, participating in the interactions is made (what could have been done differently, what was done correctly, what lesson was learned from this interaction, how to prevent an encounter from escalating in tone).

Another day is spent on troubleshooting skills. An overview of our call tracking system assists us in working out step-by-step procedures in troubleshooting and documenting equipment or system problems. As Point-to-Point Protocol calls are a bulk of our calls early in each semester, we hold training sessions that include talking a student through the PPP set up procedures and troubleshooting dial in protocol issues.

Successive days cover various specific applications used by the Help Desk to assist faculty/staff calls - Remedy (call tracking), HP Reflections, Novell (N4Pass, PC Console, NW Admin) and general areas of concern - Unix, Netscape Messenger, Print Dispatch, Networking and IP addresses.

After the completion of specific topic classroom training sessions, our new consultants are scheduled to sit with a consultant II for several shifts, listening to calls and discussing the reasoning for each troubleshooting question. Between trouble calls, the consultant II questions the new consultant on procedures and directs the new consultant to the notebook we have at each station that holds flowcharts and step-by-step procedures for many routine calls. It is only after the classroom sessions and the week of observing that the new consultant answers their first phone call. For the first week of phone work, a consultant II buddy monitors all calls answered by the new consultant.

6. EVALUATION

When our consultants are hired they are required to complete a 90-day probationary period. During that time they undergo the bulk of their training. Soon after the probationary period is over we schedule a performance review and make available an on-line test, built by Anna Perez. The test randomly presents questions from a bank of questions covering our procedures and troubleshooting techniques. If the consultant's performance in both the review and test are positive, the consultant is promoted to Consultant II and receives a pay increase.

Many projects and special assignments are reserved for consultants at this level. These consultants are given in-depth training and are eligible for cross training with other sections in the OIT department. When it is felt that the Level II consultant is ready, each individual is given the opportunity to take an advanced on-line test, from a bank of more in-depth questions. Again, if the review and test results are positive, the consultant is promoted to Consultant Level III and receives another pay increase.

7. CAREER PATH

When we introduce the career path to our consultants we help the students recognize that they have an integral role in supporting the mission and services of the OIT department, and to recognize the important part they play. We also let them know that as they develop any technical specialty they may make themselves a viable candidate for an internal transfer to another OIT section, and that if this is their goal, we will assist them in obtaining additional training and give them a recommendation to that particular section.

We also help them identify ways that their experience and on-the-job learning can help them develop skills that will be valuable in future career options. This fits well into the educational mission of UMBC, which is to continue to provide graduates who are experienced, well-educated and ready to begin high tech careers in the region.

8. CONCLUSION

The Office of Information Technology Help Desk at the University of Maryland, Baltimore County, has, in the recent past, undergone a cultural change. In the not-so-distant-past, the Help Desk consultants were merely computer lab "babysitters". Now they field service requests for faculty and staff, as well as students, and these requests come to the Help Desk in the form of phone calls, e-mail, web, and voice mail as well as walk-in.

These changes have demanded a different kind of consultant. This new consultant needs to be a person who has good customer service skills, has a broad understanding of the computing needs of the university community and is capable of communicating their knowledge with a minimum of jargon. We recognize that due to the nature of the environment that our Help Desk will always experience a turnover of personnel, but we are finding that many of our students stay with us through out their career as a student.

The full-time staff at the Help Desk for UMBC does not want you to believe that we feel that we have all of the answers to meeting the staffing needs of a Help Desk in a university setting. We do feel that, for now, we are on the right track. And we believe that the organization of any customer service group is an evolutionary process. Due to continual changes in the products that we support we recognize that there may significant change in our work environment. But we believe that the need for quality customer service support will continue, unabated.