Creating a Help Center from Scratch: A Recipe for Success

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ABSTRACT

Creating a university Help Center from scratch can be a challenging yet very rewarding experience for an IT professional. Buying computers, building networks, and installing software was just the beginning. The challenge faced by Towson University was then to make all of this technology pay off for the Faculty/Staff/Student population.

Prior to a formalized Help Center, there was a scattered approach to support. Second and third-tier support personnel were getting overloaded with "How do I?" type calls which took them away from their tasks at hand. The campus community didn't know whom to call when they had a computing problem.

 The frustration levels began to quickly escalate among both the IT staff and the end users. Something had to be done to change the status quo.

Once the idea of creating a centralized Help Center for the university was approved by the IT Oversight Committee, it was time to begin planning. We started with our mission statement:

"The Help Center is your *single point of contact* for all your computer questions, information or referrals. We listen to your needs, find the right resource, and track your problem through completion. We are your advocates for obtaining solutions to your computer inquiries."

The "recipe" for success was of our own making. We knew the end result would be a centralized IT Help Center where Towson University computer users could get answers to their questions and find the right resources to assist them with technology. Our published goal was "1 Number, 1 Call" and we knew that's where we needed to begin.

Selecting the right staff, researching and choosing the software and hardware and designing the Help Center were but a few of our 'ingredients' that needed to go into this recipe. Starting small and taking incremental steps proved to be our best approach. This was indeed a complicated recipe that took a long time to make, but the results have exceeded our expectations on many fronts.

Looking back, we had developed a strong centralized approach to technical support on the campus and have continued to grow and expand as our campus technology needs have raised the bar for all of us.

Keywords

Help Center, Customer Support, Telephone Computer Integration, Customer Relationship Management.

1. INTRODUCTION

For many years at Towson University, the support for computing systems fell squarely in the laps of the academic and administrative department secretaries. After all, these were the folks who used the systems most often and therefore the idea of 'support' fell to them by default. Looking through the campus telephone book to try to determine which person in the computing center handled what jobs was a near impossibility, so the call came in to the department secretary.

The university had two distinct groups to support computing efforts:

- Administrative Computing (student records, financial systems, human resource databases, etc.)

- Academic Computing (desktop computing applications, classroom/lab support, faculty teaching efforts, etc.)

In an effort to maximize resources and promote information technology in new ways on campus, the university decided to combine the Academic Computing Department and the Library to form the Information Resources Department. It was a bold move to combine computing and library services, but one which Towson University saw as a natural path for both areas. Traditional libraries were changing rapidly, and this joint effort was seen as a move toward consolidation of efforts to bring about a combined approach to information and retrieval. After a five year run with this model, the university disbanded the idea and let the groups return to their original missions.

Change was inevitable at the university and it wasn't long before another idea of merging came about. This time, the efforts focused on merging the Academic and Administrative departments into a single entity: Computing and Network Services (CANS).

With a new director on board, the climate was ripe for change to occur. The university had seen a marked increase in the reliance to technology, and the idea of a combined computing department made great sense. Once the merger of the two departments occurred, it was time to look at the way computer problems were handled and resolved. The 'old way' saw end users calling whomever they knew in the computing department, in hopes of finding the right solution. That method had to quickly change, as tempers flared, fingers got pointed and problems remained unresolved or lost in they system waiting for an answer.

2. A STRATEGY FOR BUILDING THE HELP CENTER

Identifying frustrated computer users on campus was easy. They were everywhere! Finding the solutions to these users' problems was less obvious and it was going to take the buy-in from a wide cross-section of the university. The best place to begin the efforts was at the campus IT committee that consisted of key faculty, staff and administrators on campus.

Efforts to identify the problem and begin the strategy for computing support were well received by the IT committee. The next step was to secure the budget to fund the Help Center.

Having never developed a Help Center from scratch, the university looked into the possibility of outsourcing the start-up efforts to an outside vendor. Trips were made to several vendor sites. Questions were asked and proposals were made. We quickly learned that establishing a new computing support center was going to be a complicated and expensive proposition.

Rather than spend precious budget dollars on an outsourcer, the university decided to approach the challenge using in-house staff. The budget of the Computing and Network Services staff was limited at best and there never seemed to be enough money to address all the concerns adequately. Shifting budget dollars away from other initiatives and toward this new support center was a tough call, but one that had to be made. Start-up costs for a support infrastructure seemed excessive. After all, the university had relied for years on little or no support, so the idea of asking for budget dollars for a new support center was unheard of.

Building a new support structure didn't stop with the physical space needed. In addition to shifting budget dollars to this effort, there also needed to be a shift in positions in order to staff the new Help Center. Every other unit within the newly formed Computing and Network Services department was requesting more funding and staffing, yet it was clearly evident that sacrifices would

need to be made in order to get the new Help Center off the ground.

The strategy for the new Help Center was to start small and tackle the most pressing areas first. Supporting the university faculty and staff was the top priority, and it was determined that a call-in type center would be the best approach.

In the summer of 1997, the Computing and Network Services Help Center was born. Originally launched with a manager and three support professionals, the challenge was placed before us. A mission statement was written and a bold new concept launched this effort: "1 Number… 1 Call." Identifying the problem, mapping a strategy, gaining the budget and hiring the personnel was just the first step for the new CANS Help Center. Now we had to put in place all the other tools that were needed to make this operation a success.

3. SELECTING THE SOFTWARE

The entire Help Desk industry was still very young in the mid to late 90's. Large-scale business enterprises with seemingly endless budgets had led the charge in establishing centralized support centers for their computer users, but it was a different story for most universities. Relying on knowledgeable secretaries and student workers had helped us "get by" up until then, but it was now time to re-examine how we were going to provide a single point of contact for computing questions.

Finding the right call logging and tracking software proved to be a larger challenge than we anticipated. This newly formed Help Center staff began to explore all the available options and the myriad of choices available at the time. Relying upon profession associations such as The Help Desk Institute provided us with a road map for beginning our search. We attended help desk industry trade shows and gathered more information and brochures than we thought possible. Developing a matrix and rank ordering our needs helped us determine how to sift through all this information to find the right package for our use.

Doing reference checks with current users of software packages helped us learn what did and didn't work in the 'real' support world, not just that of the glossy software brochures. Not only did we need to plan for our current support needs, but we also needed to plan for projected growth in the support area. After several site visits, reference checks and research of the industry literature, we decided on McAfee Total Service Desk as our choice.

4. SELECTING THE HARDWARE

Keeping up with the moving target of supplying state-of-the-art PCs was certainly going to be an on-going challenge for the Help Center. It was decided that we needed to purchase the most up-to-date hardware to now handle the demands of the McAfee Total Service Desk Solution.

Communication with the end users would primarily been done via telephone. Endless hours on a standard corded phone would surely provide its own set of ergonomic challenges. We decided to opt for 900mhz cordless phones that provided optimal freedom of movement for the Help Center staff, while still producing a clear signal and reception. Mobility away from the desktop was another element that helped avoid Help Center burnout.

Once the call tracking software and hardware were selected, it was then time to address the integration of telephones and computers into what was emerging as a new concept in the industry: "TCI" (Telephone Computer Integration). Again our research efforts paid off as we selected Teloquent as the new Automatic Call Distributor (ACD) for the Help Center. We knew there would be hundreds of incoming calls to the center and Teloquent provided us a means to capture those numbers. We were now able to track hold times, route to specific 'specialists' in the center, permit the Help Center Representatives to log in and out of the system and provide us valuable data that could be used to substantiate call volumes and plan for future growth.

5. DESIGNING AND BUILDING A NEW PHYSICAL HELP CENTER

The challenge to design a new Help Center from scratch included how to turn a cinder-blocked room into a welcoming, professional center. A former classroom was now our space and we were tasked with making it into the new Help Center. Knowing that 'human factors' would play a large role in the look and feel of the center, there was particular attention paid to aesthetics.

Calm, cool colors were selected for the carpeting that set the entire tone of the room. The room was painted a light blue/gray color, but it didn't look right. Some on-the-spot training for our paint crew was in order. Sea sponges dipped into slightly darker monochromatic colors yielded a great effect on the walls. Soon the entire room was awash in a dizzying array of blue/gray and mauve, all colors that were picked up from the carpeting. Lots of ribbing from fellow staffers couldn't dissuade us from our mission. "Just wait" was the reply. "It's not finished yet" was my standard response when the critics came by to offer their opinions on the new space.

In addition to calm, cool colors on the walls, we added silk plants around the room. After all, the Help Center was located two floors underground and the lack of daylight had a big impact on the outlook of the staff. Silk plants came and pictures on the walls were the answer. Having very limited funding for such things as artwork, we found a little known "art to loan" program sponsored by the university's Art Department. We could 'borrow' pictures from the collection and use them in our design scheme. First impressions count for both the staff as well as the visitors to the Help Center. This design approach proved to be very successful in establishing a professional and approachable environment for both visitors and staff.

6. COMMUNICATING TO THE CAMPUS

The summer of 1997 passed quickly as the opening day of the semester drew near. We had built the space, staffed it, outfitted the technology, and we were now ready to open the doors for business.

Designing a brochure to launch the new Help Center was our first communication task. With a tight budget, we knew we'd have to do the layout and design work ourselves, so we set out to develop a brochure to introduce the Help Center to the campus. Once we had developed a straightforward piece that told of our service, we mailed it out to each faculty and staff member on campus. Periodic e-mails to all faculty and staff began to appear. We developed a 'standard template' of how the Help Center communications should appear, with a consistent message, format and signature block.

Soon after our brochure was launched our next task was to design a web page for the Help Center. Rather than telling users the same answers time and again, we could now refer them to a central website with announcements, FAQ's, and step-by-step procedures for the wide variety of applications supported by Computing and Network Services.

Once there was a consistent approach to making all user announcements on email, we began to cross-market the CANS webs pages via our email messages. "Read more about it" began to gain in popularity for those folks who wanted to delve deeper into the technical details of the announcement. For most others, however, the concise and pointed announcements were enough to meet their needs, without overwhelming with them "tech-speak."

7. CHANGING THE WAY WE DO BUSINESS

Moving the Help Center to the forefront of the department had positioned it to be the pivotal point for logging and tracking requests for help. No longer did 2nd and 3rd level professionals have to handle the "how do I?" questions which had been taking up much of their valuable time. They could now refer people to the newly established Help Center.

Part of the challenge in getting other units within Computing and Network Services to refer and hand-off to the Help Center was establishing a level of confidence that the Help Center could, indeed, handle the first level requests at an acceptable rate and do so accurately and with an understanding of customer service

principles. Soon the Help Center staff was hitting over an 80% "1st Call Resolution" rate. The more problems they solved, the more problems were handed over to them. The goal of a single point of contact was becoming a reality.

Soon the new Help Center began to realize that providing a handoff of the unresolved issues took more than just opening up a trouble ticket. Second and third-tier professionals now counted on the Help Center to "take care of the problems" so they could concentrate on higher-level technical problems. Part of the follow-through for the customer meant that the Help Center personnel needed to track referred beyond the initial ticket being opened. Using the escalation systems built into the call tracking software didn't seem to be working effectively since a majority of calls were logged as "normal status." The solution was found in more pro-active communication with the managers of the second and third tier groups. Before long, these folks were being called into Help Center staff meetings as "guest trainers" on their particular topic of expertise.

With an impressive 80%+ first call resolution rate, the Help Center still could not rest of their laurels. It was the remaining 20% of calls that still needed 'hands-on' attention by the Client Services field support group. Timing was essential as was teamwork and cooperation. Outfitting the Client Services staff with alphanumeric pages and then cell phones gave them the instant contact they needed in the field. They were now able to respond more quickly to users' needs and work more efficiently as they moved across a very large campus.

8. MOVING TOWARD SELF-SUFFICIENCY

As the Towson University campus became more comfortable with browsers and using the web, the Help Center began to refer users to CANS' web pages to find the answers they sought. Expanding the website from a simple informational site into a full-fledged support system took time and talent. Developing web designed web pages that stepped a user through a problem became a big challenge.

Raising the bar for users became a goal for the Help Center. Clear, concise communications to the campus became a standard. Second and third-tier support groups began to look to the Help Center to "polish" their requests for all user announcements. Having a track record of sending out well-written announcements lent credibility in the Help Center's ability to get the message out to users in a manner that minimized confusion, answered potential questions and thoroughly explained the "5 W's" of the announcement. Basic journalistic techniques served the Help Center well in preparing its written communications to the campus.

9. PROBLEMS AND OBSTACLES

Placing a call logging/tracking package in place was only the first step in re-engineering the business processes of the university. Second and third tier-support groups needed to buy into the concept of a centralized Help Center, which was going to front-

end trouble tickets for them. Some of the units in the department saw this change as a treat to their own operations. If the Help Center could solve the majority of people's computing problems, then why would they be needed? This fear never materialized. In fact, the concept worked very well, once the groups saw the value in having a centralized support operation that logged and tracked trouble tickets throughout the department.

Promoting 'self-sufficiency' can be a difficult thing. The success of the Help Center was reflected in the increased numbers of people calling the Help Center for solutions. One of the goals of the Help Center is to promote technological self-sufficiency for all users. Using directed emails that linked to CANS' websites to "read more about it" filled the niche for those users hungry for knowledge. For the others, self-sufficiency was still a lofty goal. The Help Center had become so successful that many folks never even thought to look up solutions on their own.

Another big obstacle met by the Help Center was answering the question, "When will someone arrive to fix my problem?" The ratio of computer workstations to client services technicians was 417:1. Part of the challenge for CANS' management team was to identify the need for additional field support technicians and gain approval for hiring additional staff in order to keep pace with an ever-increasing queue of work order tickets.

In addition, some units within CANS were seeing slow turn-around time to resolve second and third-tier problems. Part of the solution came when the Help Center began to invite "guest trainers" into the Help Center staff meetings to discuss concerns. These "guest trainers" were personnel from the second and third-tier support groups who would share the knowledge, processes and FAQ's that most often reached their groups. By training Help Center personnel in how to resolve these issues, everyone became a winner. This process is on-going and takes time but each learning experience gave the Help Center a better grasp on issues and how to resolve them at first-tier rather than routing them upward.

10. EXPANDING SERVICES

In the three years since the Help Center was implemented, it has undergone a series of advances in service. Each step became a building block for the next:

Year 1: Initial implementation of a Faculty/Staff call-in Help Center only

(Weekdays, 8am – 5pm)

This included the development of Help Center web pages for documentation, download and information. Additionally, the Help Center encouraged the use of fax, e-mail and web pages in addition to telephone contact.

Year 2: A walk-up Help Center Service Desk was established.

Face-to-face interactions became the next available service for the Help Center. New account generation, laptop checkout, questions and concerns all greeted the counter staff. The addition of "Getting Started"

packets occurred during this year. Users could "pick & choose" topic brochures, based upon their individual needs. Complete packets were sent to every department on campus as a general point of reference.

Evening hours were added to the Help Center's daytime hours:
(Monday-Thursday 5pm – 11:30pm)
(Friday 8am – 5pm)

Year 3:   Weekend Hours were added:
(Saturday 10am – 6pm and Sunday 6pm – 10pm)

Support for Telecommunications was added in addition to computer support. A quick learning curve for Help Center staff made for a smooth transition to this new service.

The Help Center began with a staff of four professionals and within three years, the staff had grown to nine full time professionals and six part-time student assistants. It was clear that support was being well received on the Towson University campus, but the challenge of leveraging technology to make better use of professional's time was still our goal.

One step at a time seemed to be our motto. Building upon prior success and then assessing the impact to the university served us well. Each 'victory' in service provided more challenges as each new rollout of software came our way.

11. CONCLUSION

When starting out with the challenge of building a Help Center from scratch, it can be very daunting. Taking things one step at time and building on each success was the formula that worked for Towson University.

Redesigning the way we provided support to the campus took a great deal of time and planning. Putting the infrastructure of hardware/software/personnel in place was the initial goal. Determining priorities and focusing efforts was the initial goal for the Help Center. Each year brought new challenges and new successes.

Planning for future expansion is always on the horizon for the Help Center. As technology continues to rapidly evolve, the needs need for on-going support increases as well. It is the challenge of the CANS Help Center to keep a fine-tuning what has become a high standard for customer service and technical support on the campus.