



## **WHITE PAPER**

# **Help Desk and The E-Mail Trap**

**An analysis outlining the issues surrounding E-mail Based support for IT and customer support organizations**

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**September 2008**

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## **Help Desk and The E-Mail Trap**

### **Help Desk - Burden On The Enterprise**

The Help Desk function is too often seen as a necessary and grudging cost of doing business. It takes resources for what appears to be a non-productive burden – a necessary evil that subtracts from the core mission of the enterprise. As a direct consequence of this attitude, organizations will apply the minimum amount of resources to this activity that they can get away with.

And in doing so, they put the seal on a self-fulfilling prophecy. "...It does nothing for our core business and it only costs money." The truth of this statement is self evident – if that indeed characterizes your approach. Typically, the path of least resistance is taken, sometimes referred to as the P.O.L. approach:

### **The P.O.L. Approach**

Costs are minimized by establishing an email address to which all help desk requests are to be directed. A barely sufficient amount of staff resources are assigned to monitor and respond to these requests for help. Help-desk personnel then re-act to these requests as best they can – the objective being to keep the overall pain level of the organization to a dull roar - commensurate with minimizing the overhead costs in dealing with it.

And therein lies the trap.

### **A Trap Is Set – And Then Sprung**

By instituting this process, a path is set that dooms the effort to being a static sink of resources, and to no net gain for the enterprise. It is not merely this drain that is the loss however. The failure to leverage the help desk as the primary tool towards improving the effectiveness of the enterprise will be a far greater loss. Setting up an email address and allocating some resources to respond to it, in effect leads down a dead end path – an inviting trap that usually starts out innocently enough when the need is still small and/or under-recognized. Inevitably it grows over time, and so the help organization initiates a simple spreadsheet to help keep track of problems and their status – this grows into a small database that keeps track of "tickets", then maybe a simple web interface is cobbled together to allow easy status updating and monitoring by support personnel

Eventually a "support system" will evolve that "just grew" from this email-triggered base, but it still remains a drain rather than an asset that can be exploited. Because its roots lie in email and the inherently unstructured nature of such messages, any information content that might be harvested for other purposes is minimal. The information content of a ticket will be limited to the identity of the submitter, a one-line description of the issue (derived from the "subject" line of the email) and the essentially amorphous textual body of the initial email.

## **Dangling The Bait To Positive Exploitation**

An effective help-desk system must have an easy-to-use and low-entry threshold if it is to achieve its objectives. Setting up complex procedures or requiring users to fill in anything but a minimal on-line form will encourage users to “sweat it out” or depend on the goodwill of cooperative colleagues to get involved in finding a solution – both paths serving to aggravate productivity losses instead of alleviate them.

If on the other hand, a simple and easy to remember web address is provided for access to the help desk, particularly one where initial invocation by the user results in easy initiation of a new ticket with minimal fuss, the ground can be laid for a much more productive dialogue with the help desk personnel. This is particularly the case where help desk responses and subsequent customer replies are also entered into the system by each party using a web interface. Each dialogue entry then triggers the automatic generation of an email notification to the other party with an embedded URL. When the email is received, a single click then takes the responding party back into the system directly to the appropriate record.

This way a comprehensive dialogue about a user’s problem can be maintained and reviewed, at any time, as a single cohesive “ticket” rather than a series of disjointed emails scattered over time.

Technically the difference is minor – but psychologically the inertial barrier to the end-user is much lower and the experience more gratifying, or at least less of an irritation. The user is now much more prepared to deal with entering some data into form fields, particularly if these self-evidently pertain the getting effective help quicker. Users are quite happy to provide priorities (Lo, Medium, Hi) and categorize the problem (Hardware, Network, Operating System, Application) as well as provide other information if it is clearly aimed at getting the problem resolved quicker (rather than a troll for marketing information) and is painless to provide.

## **Penalties Attached To The Easy Way Out**

The penalties attached to using a simplistic email-based dialogue system are myriad. Any single one of these can severely compromise effectiveness, but taken together they guarantee a demoralized and ineffective help team and a quagmire of wasted resources. Worst of all – they will accrue to a serious and long-term impact on mission effectiveness that is the inevitable result of an unhappy user population.

Consider:

- As any given help dialogue extends over multiple e-mails, synchronizing and tracking the follow-ups with an existing case can be difficult – leading to loss of context and requiring the user to “re-tell the story” leading to waste and frustration by all parties.
- Support emails are a blank slate where it is impossible for the help team to channel users into answering specific questions. As a result, it takes multiple exchanges to establish vital facts such as location, call-back-number, operating environment, problem severity and so forth – all compounded by the “loss of context” problem with each exchange as cited above

- Sharing of information across the support organization is hampered and dispatching is difficult. Multiple support technicians may become entangled with a single user at the same time – exacerbating the unhappiness all round.
- The intellectual capital (or “knowledge base”) that was so painfully acquired is frittered away in an unstructured mass of disparate emails. Those who do not learn from history are bound to repeat... Scratch the surface of any support organization, and you will hear a horror story of the simple fix that every user had to discover anew – but was never documented nor fixed in a subsequent release - because nobody realized it was endemic. By contrast, there are as many anecdotes where a well-structured and indexed knowledge base was pivotal to the success of an organization. Almost any text-book, class, standard, consultant or organization that has the word “quality” in their description will iterate this basic theme.
- There is almost no opportunity to generate meaningful management reports by which the (lack of) effectiveness of a help organization can be measured. Management is reduced to flying blind and by the seat of the pants – not only in terms of overall mission effectiveness, but how many and what kind of resources are required or redundant. There is little hope of being able to isolate and identify the “high value but low cost” issues (let alone fix them) except by chance conversations over the water cooler.
- The status of a case is almost never clear, but must be deduced, sometimes implicitly, from within the accumulated story spread across multiple emails. There is no crisp flag which identifies an issue as closed, or still awaiting an answer, or pending some other event, or whatever. Some cases are indeed eventually closed, but others merely decay over time with no final resolution except a dissatisfied and ultimately unhappy user.
- Emails, by their very nature are stored within somebody’s email folders, possibly on an individual’s personal machine. In the worst case, the emails for the help organization may be spread across multiple machines – at work and at home. At best, they are stored on the organization’s “server box”, but they are still fragmented across multiple shared accounts rather than as a single organized corpus, and can be accessed only via email-savvy client software. On the other hand, a web-based and database-driven system will support access from any machine that supports a browser and from any location that permits network access.

### **Turning A Sow’s Ear Into A Silk Purse.**

Instead of looking at the support organization as a necessary evil, and one whose cost is a burden to be minimized, it can also be viewed as the front-line scouting organization that feeds information back into the enterprise that is critical to its survival – let alone improvement and growth over time.

Any complex entity or system, whether it be a biological or a man-made organization, must rely on some kind of feedback to direct its progress and prevent it from randomly stumbling around in the hope of surviving. Exploiting this feedback implies not only data flow from some kind of sensory mechanism, but the ability to then process that data into meaningful information, upon which intelligent decision making can then be based. The help desk (in whatever form it exists – formal or informal) is not the only sensing mechanism an organization will have, but it is

certainly the “front line” in detecting pain or other threats to survival, as well as the ability to pick up on opportunities for new solutions

Capturing the feedback and processing the data implies that it must have some structure from which meaning can be derived (a database with records and relationships) rather than existing as an amorphous pile of text messages. Furthermore, to be exploited effectively, the database must be easily accessible – “easy” both in terms of understandability of the information, and encouraging access with minimal fuss. An effective database is not only useful in fulfilling the help organization’s primary mission of short-term end-user assistance, it is also a significant source from which longer-term strategic direction can be derived to help the enterprise as a whole adapt and evolve as the environment changes – be it marketing, technical, economic or political.

All this boils down to the requirement for a simple but comprehensive web-based solution built on an integrated database, one that permits rapid and inexpensive deployment, requires a minimum of care and feeding, but is effective in fulfilling its promises.

### **The Cost! I Can’t Afford It!**

There are solutions available in the market-place that carry a purchase cost measured in six-figures, together with a commensurate annual software maintenance fee. In addition they demand the services of at least one full-time system administrator, an application guru (or “consultant”) specialized in that particular product, and possibly even a database administrator to install and keep it all running smoothly. And this is before you even start looking at the cost of the support organization itself which actually performs the work of the help desk.

It is no wonder that small-to-medium organizations frequently opt to sweat it out with a simple email infrastructure and a hand-to-mouth survival strategy.

But there are reasonable alternatives which evade these two extremes.

### **Cost of Ownership – A Fraction of The Cost of Inaction**

There are many offerings of Help Desk Software today, and many are free or very affordable. The website [www.helpdesk.com](http://www.helpdesk.com) is a directory of Help Desk software providers with a few hundred listings. There is really no excuse for companies not to invest the time and resources needed to implement a web-based help desk for their organization.

One affordable (\$300 for 3 techs or even free for 2 techs ) web-based Help Desk system is available from Internet Software Sciences ([www.inet-sciences.com](http://www.inet-sciences.com)) is called Web+Center.

This system can be downloaded and installed in a few hours and fully configured in a few more hours. This system will instantly provide for your customers/staff the options to:

- Self-Register into the trouble ticket Help Desk System
- Create/Update trouble tickets
- Review FAQ articles
- Search Help Desk Database of knowledge articles by keywords or categories

- Let customers share to upload/download files for support options
- Start Text messaging chat sessions with support technicians

Technicians and support groups can then easily:

- Get email notified of new support cases, and then track, dispatch and manage support cases
- Notify customers of updates automatically
- Perform knowledge base keyword and case searches
- Perform asset management and tracking
- Perform customer, cases, and asset searches
- Run reports showing Help Desk productivity and resource utilization
- Schedule and coordinate work with group calendar functions
- Oversee entire operations workload and issues
- Create a searchable keyword knowledge base of common problems and solutions from their support tickets

**Don't fall for the trap – Invest the time and resources into an effective web-based Help Desk Software package today.**

The choice is whether to incur major (hidden) expenses by falling into the cost-minimization trap – or to grasp the opportunity in a proactive fashion by transforming a problem area into a key strategic lever to forwarding the enterprise. If you think you can't afford it – you certainly can't afford the even greater costs of ignoring it or trying to evade it.

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**About the Author:**

Jitze Couperus is a veteran of nearly four decades in the computer industry, the first three of which were in R&D for a major computer manufacturer. Since then he has been a principal consultant with a well-known systems integrator, and is currently a senior design consultant in the area of Customer Relationship Management with emphasis on the effective deployment of Help Desk organizations. He can be reached directly by email at [couperusj@sbcglobal.net](mailto:couperusj@sbcglobal.net).