



A Time for Service Leadership

What are they thinking?

I am sure that am not the only one slightly discouraged by the current lack of leadership in America today. In my travels, I have had many discussions with business executives, support managers and customers on this topic. In most cases, the sense of frustration centers around leadership without vision, purpose, caring and the moral backbone to do what's right for the customers they serve and the people they lead. It is evident in the recent headlines where major US companies are making decisions and taking a course of action that leaves the rest of saying, "What were they thinking?" I have to assume that the executives making these decisions are certainly capable, so why are we left with a feeling of amazement, disengagement and disappointment?

Every day leaders

In my many leadership positions and interaction with support professionals around the world, effective leadership comes down to one thing – they will care when they know that you care! In recent Gallop Polls regarding the state of the US worker, it is shocking and disappointing to see how many people are truly disengaged in the workplace. In support organizations, the biggest differentiator between the organizations that excel at support, customer service and delivering business value versus the ones that consistently struggle is leadership. Leaders who wake up every day and approach their responsibility with energy, passion, caring and intelligence will make a difference in people's lives. These leaders never forget where they came from, what it took get where they are and the important lessons they learned along the way. They are particularly resourceful and utilize trusted, experienced mentors for advice, direction and support. What's even more interesting is the fact that these leaders, who are successful and happy, are humble! They never let their egos convince them that they are the smartest people in the room. In reality, they never let arrogance stand in the way of being a good listener and a continuous learner.

Service leadership

Service leadership is about doing the right thing and making fact-based decisions. It's about challenging conventional wisdom and having the moral backbone to stand up for doing the right thing for the customers and people they serve. Service leadership is a servant role that looks at

the business of service and support creatively and innovatively with a foundation based on industry best practices. They strongly believe that delivering exceptional customer service is not difficult as long as you stand by the customer service principle of treating every customer like they were your only customer. They know that the difficult part of delivering consistent service that meets their customer's expectations is ensuring that the rest of the organization doesn't create barriers that make them hard to do business with. I challenge all service leaders to set the bar for your team and constantly measure and continuously improve creating a culture of encouragement and rewards for over and above performance.

I have broken down **Service leadership** into the following five areas:

1. Leadership

- Create the strategy and vision
- Create a service culture
- Set the example

2. Customer Advocacy

- Be the voice of the customer
- Listen, listen, listen
- Always market, communicate and build lasting customer relationships

3. Business Savvy

- Solve the business problem
- Be relevant to the business - find ways to increase bottom-line profitability
- Be adaptive, flexible and responsive to business priorities

4. Get It Done

- Remove barriers for front-line
- Deliver quantifiable results
- Hold your team accountable – practice total contact ownership

5. Ambassadors

- Work well with other teams to deliver transparent services to the business
- Be EZ to do business with
- Work with a sense of urgency and passionate

Service leadership takes courage. It is something that can guide your decisions and your day-to-day interaction with customers, team, peers and management. It's time for a change in the way we lead and work to reengage our team and our customers, giving them hope and purpose that their needs come before ours. They need to know and see that they are the central focus when

decisions are made. Great leaders know that at the end of the day – their customers are the only reason they are in business and their people are the business. Under normal circumstances, we would use 1 year past history as a benchmark for our trending.

An Informal gathering

I was at an event recently and had the opportunity to spend some great social networking time with some Service and Support industry friends and colleagues. I really enjoy this opportunity to share old war stories and learn what's new in their lives and work experiences. As the conversation continued, I was able to reflect back on all the collective conversations we have had over the years and how this group truly embodied Service Leadership. These service leaders shared their passion for delivering quality customer service, their attention and understanding of the many intricate and interrelated details of service and support and their positive energy for creating a service culture by empowering individuals to work as teams. I admire this group for many reasons. What I appreciate the most is that they all did the job. Their experiences are first-hand. They only excelled after experimenting with calculated chances aimed at proving conventional wisdom wrong. In the end, they were right in their belief of Total Contact Ownership and investing in Level-1 to increase first contact resolution, increase customer satisfaction, lower resolution costs and positively impacting all other performance measurements. I am brought back to the conversation with the question of what does it take to be a Service Leader?

Details, details, details

I always remember being challenged when trying to communicate the impact of any upgrade, update, rollout, new release or change gone bad to management. The frustration of experiencing the steady state call volume spike and trying to get the attention of the project management team who were already claiming victory and celebrating success. I always felt like an idiot when management challenged my initial report of the impact, what caused it, what types of calls we were receiving and what we were doing to handle it both reactively and proactively. "You know Pete, the change was not intended to impact that area of the customer's functionality – you must be mistaken."

It's always important to know the facts, the details and what you are planning to do about it before ever engaging management about the situation. In fact, your credibility rests in the details regarding anything you do to proactively change the situation for the better. If you talk to

any Service Leader, they will quickly give you the areas of opportunity for positively impacting the business.

1. Minimize the impact of any change, rollout or upgrade by working closely with the project team to ensure the quality in testing, documentation, communication, knowledge and escalation/resolution.
2. Always working with Level-2 management on minimizing escalations by focusing on what your team can resolve at Level-1 and what knowledge, training, documentation and tools you need to make it happen.
3. Reporting aging tickets and linking the follow-up, status and resolution to the Total contact Ownership philosophy that has guided many best-in-class service and support organizations.
4. Hold you team accountable for mastering the role of service and support professional. These are the best practices that any and all customer support professionals should practice on a daily basis. It ranges from attitude to 100% incident tracking, validating resolution to anticipating the customer's needs and proactively identifying trends and quality ticket documentation.
5. Creating an IT culture where everyone works for the Service Desk. Where the Service Desk is seen and treated as the "Voice of the Customer" and as the customer advocate, they are given the benefit of the doubt and respect when they bring the impact details and case for taking immediate corrective action.

Deliver tactical results

As I struggled to find my 'voice' in the organization, a mentor of mind reminded me that my audience was more likely to take me and the team seriously if we had a track record of results. He called it credibility with the organization and stated factually, "they won't listen to you strategically, unless you can deliver tactically." That single piece of advice changed the focus of my day-day management of the operation. For me, the daily focus was establishing a foundation that was based on help desk basics and best practices – right from the book. I established the standard operational procedures, configured the tools of the trade to support the processes, trained the team on how and why these daily practices were critical to theirs and our success and then hold them accountable for meeting the performance targets.

It ALL makes a difference!

From the way you configure the ACD menu options, to your schedule and individual adherence, the standard, consistent greeting, 100% ticket tracking with standards for quality ticket

documentation, status and follow-up, managing call volume spikes and operating level agreements with peers to letting customer satisfaction be your guide in telling you if you are doing the right things. Once you are doing the job consistently and you confidently know you are because you see it, report on it and live it by the numbers daily, it's time to hand over the day to day operations to your team. It's time to begin the role you were meant to play.

The role of the customer advocate, the defender, the ambassador, the communicator.

Engage your team

It's not easy handing off the day to day operations to your team, but it shouldn't be hard either. I often thought my main focus after the improvements were put into place was to remove myself as the "bottleneck" in decision-making. You engaged your team throughout the journey where they helped you with decisions, you sought their advice and buy-in into what and how was being implemented and recognized early that they would be the ones that had to "live" with it on a daily basis. It passed the common-sense and "why" it was important test. It was up to you to create this sense of urgency, sense of empathy and sense of purpose.

As you leave the day-to-day operations in the capable hands of your team, make sure you take the time to mentor them and show them first-hand leadership by example. They need to see you in action so they know what's important and how to handle situations they way you would have handled them. Never assume that everyone can figure this out. Make yourself available to them for coaching, questions and make sure they know the boundaries in which they can make front-line decisions.

I will never forget the lessons I learned when I tried to re-engage myself into operations and decisions when the team was functioning quite well without me. I called into the help desk from vacation and a senior team member was insulted when I asked how everything was going. She said, "Pete, we have everything covered, you trained us yourself. Go and enjoy your vacation with your family and do not call in her again – got it?" Lesson learned.

Just the facts

I learned quickly to take the emotion and personality out of reporting. Management does not necessarily enjoy hearing about problems on a regular basis. In your reporting you need to establish the facts, the actual numbers, the real business impact, the costs, the trends and what you plan or recommend doing about it. I would establish reporting that meets the needs of your audiences and stakeholders. I always tried to separate operational reporting which was geared

for me and the team versus management reporting which focus on areas that impacted all of IT and the business.

One of my CIOs became actively involved in Service Level Management and was interested in the response and resolution times for all IT resources based on priority, impact and urgency. She was focused on aging tickets and worked with the different group managers to understand this was a priority for her and should be for them! She regularly took them on customer tours to see the “face” behind every ticket. It was at this meeting that she informed all of her direct reports that they ALL worked for the Help Desk. She surprised them all again by saying that 25% of their performance review would be based on the success of the Help Desk. You could have heard an aging ticket being closed!

Support leaders must know the numbers, the story behind those numbers and how to tell and sell the success story.

Sell the success story

If you don't tell people your success story, who will? Or, asked in another way, if a support success story is told and no one is listening, does it make a sound? A support success story is a brief, eight- to ten-slide presentation on the state of the support organization. It should include:

- Breadth and depth of your services
- Value proposition
- Involvement in current IT/Business projects
- Business impact measurements
- Cost-effective best practices
- Customer testimonials
- Org Chart showing the many proactive roles in your organization

Tell your support success story to whoever will listen. It works. I know of one CIO who was so impressed by the presentation that he had it mounted on an easel outside his office. As senior executives walked by and inquired about it, the CIO told the support success story. That's high-visibility marketing.

For unexpected encounters with senior management, prepare an Elevator Pitch - a focused, deliberate, 15-second message that paints a memorable picture of business value delivered (e.g.,

impact, results, continuous improvement). Leave them with a confidence, with a great impression, and with wanting more. For example:

“Thanks for asking; everything is going well. We completed an assessment of our support operations against customer needs, industry benchmarks, and demonstrated best practices. From there, we created a 30-60-90-day continuous improvement plan, which aligned our support strategy, structure and services to better address the needs of our customers. We delivered phase 1 where we eliminated 10% of our calls, we are solving more problems, faster at tier-1 while reducing the total cost of support to the organization. I’d love to share with you additional results, business value delivered, and customer testimonials at your convenience. I’d also appreciate it if you could spend a few hours with the service desk so you can see us in action to understand how we’re driving customer satisfaction.”

Strategic thinking

It’s often difficult to find time to be a strategic thinker when you are delivering tactically. The following has guided me through many difficult situations that required a strategic framework in order to properly align all of the continuous improvements we were presenting to senior management:

1. Know where you are — assessment (How do we track our progress along the journey?)
2. Know where you are going — strategy, vision, end-metric or result (What is the right outcome for the customer and the business?)
3. Know how you are going to get there — the roadmap (How do we make forward progress?)

These three simple guidelines have always worked for me when I needed to simplify and articulate a story so senior management could “get it quickly.” Ask yourself, “In the end, how will I know if we are successful? What does success look like? How will I know if we have achieved it?” Envision the end, and then build the roadmap to take you from today to tomorrow. And remember — the arrival must be empirical, quantifiable and visible.

Success is entirely dependent on how you define, pursue, and measure it. It comes by focusing and working relentlessly toward the right end metrics. In short, success comes to Service Leaders who plan the work and work the plan. Service Leaders use this success strategy to inspire themselves and their teams to provide valued services to their customers. Remember, your customers are depending on you to make their voice heard! Don’t disappoint them!

I just completed a 4 month project for a customer where I was asked to replace the Service Desk manager, assess the team's performance and implement recommendations for continuous improvement. It was a wonderful experience to be able to practice what I preach and gain further insights into team and organizational dynamics. There were a few basic components missing from the way this Service Desk operated. To sum it up:

- They were not a team.
- They had not embraced industry best practices.
- They were lacking trust, communication and shared goals.
- They were individual contributors, all doing their job their way with little concern for all doing it the same right way.

I started my assignment by observing, interviewing, communicating and building trust by leading by example. To me, establishing what is important to you in terms of performance and professionalism is the first step. You have to tell the team what matters most to you, what you care about and what they should care about and then be relentless in your pursuit to ensure it is engrained in their daily behavior. You also have to show them by providing them with one-on-one and team training as well as linking their new and improved actions to results/consequences. The team had become reliant on the manager to make all of their decisions for them and I believed it was holding them back. We implemented daily 15 minute team meetings to rebuild the trust and open up the communication channels. I 'pushed' back on making decisions for them when I knew they could make them on their own or by consulting their teammates.

The natural leaders quickly rose to the challenge and helped the other team members who were struggling with the new directive aimed at harnessing the power of the team. We used examples and scenarios to clearly communicate to the team the difference between unacceptable, expected and over-and-above performance. The team agreed to police their own performance using a daily scorecard and work with other team members who needed coaching on the newly focused best practices of service and support. I think the greatest satisfaction for me with this team was restoring their pride in themselves, their work and their team. Service Desk pride is a key component of success. The professional and the team must take pride in their professionalism, customer service and their attitude and approach towards the customer and their peers in supporting the business. Then, and only then, will the organization respect them and treat them for the customer service professionals they are and their ability to work their issues to resolution in a timely manner.

After transitioning my responsibilities to a permanent Service Desk manager who I interviewed and recommended for the position, I sent this Top Ten list to the team in place of a messy, "tearful" goodbye. I asked them to keep this list top-of-mind as they engaged with customers, team mates and peers on a daily basis. I promised that if they focused on these Top Ten best practices, they would be rewarded in more ways than they could possibly imagine.

The Top 10 Service and Support Best Practices:

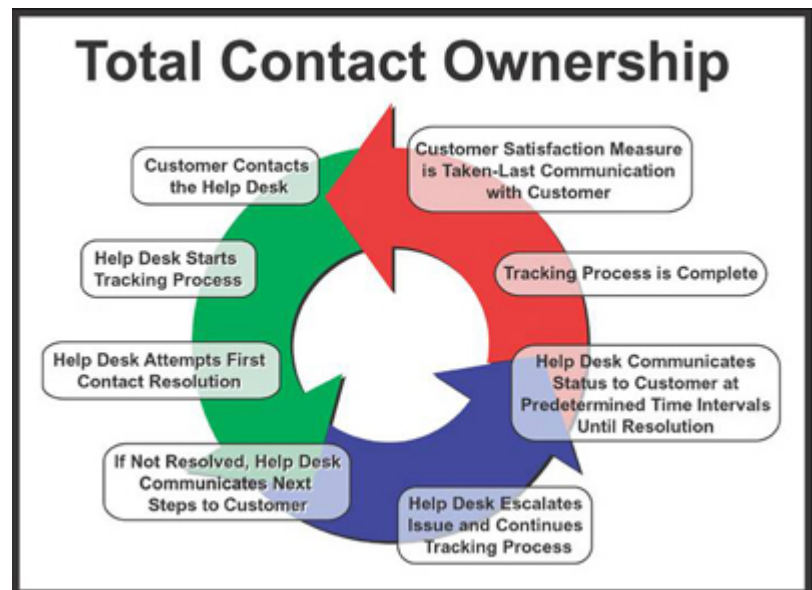
1. Attitude is Everything - go into every situation with a positive attitude and the intent on doing the right thing for the customer and everyone will benefit.

2. No Excuses, Just Solutions - never dead-end your customer or assume you know the details of their issue/request without "seeking to understand", asking the right questions and actively listening.

3. Team Work - empowering the team to make front-line decisions and coordinate best practice processes is the only way Service Desks can survive and thrive in today's ever demanding role as the Customer Advocate and single point of contact for all customer issues and requests.

4. Customer Advocate - you represent the 'voice of the customer' which means the customer trusts you to represent them and their issue/request to the other support teams, coordinate timely resolutions and eliminate reoccurring issues.

5. Total Contact Ownership - is built upon the premise that the Service Desk will continue to address a customer's issue/request and follow up



until the issue or question is resolved to the customer's satisfaction. The entire team must diligently and relentlessly follow-up on ALL of their un-resolved tickets (especially the ones not recently statuses), no matter who is currently assigned to work on it.

6. Quality Ticket Documentation - Research, diagnose, prioritize and document thoroughly (it did not happen if it's not documented in the ticket). Always ask yourself - "if I was sending this to

myself - would I have the right information to begin resolving the issue from the last troubleshooting step attempted by the Service Desk?"

7. Fun - having fun is a key component of successful teams. It is up to all of you to make your environment and Service Desk culture a place that is supportive, respectful, hard-working, focused & fun. Fun will be much more "fun" when all of you all agree that you have earned and deserve it.

8. Being Proactive - Spotting trends, related issues and reoccurring issues and working to ensure that we minimize business impact, communicate appropriately and work to learn from the situation. Provide assistance in bringing visibility to the issue and its impact and what we need to do to identify the root cause and long-term resolution - eliminating the reoccurrence of these problems.

9. First Contact Resolution - you should use all of our available resources (team members, training, tools, documentation, past incidents, etc.) to facilitate solving our customers issue on the first contact. It leads to a higher level of customer satisfaction, improves our image, allows Level-2 teams to be more responsive and improves our productivity. Research issues in depth or resolved and only escalate when you have exhausted all avenues to resolve at the Service Desk. If you don't know the answer – find out by research or asking someone - the collection of learning in the process will better prepare you for the next time this issue is reported. Always Know!

10. Solve the Business Problem First - then address the technical or policy issues. Always ask yourself and then document it in the ticket - who is the customer, what are they trying to do, what can't they do and how critical is it in terms of productivity, impact and patient care.



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