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## Successfully Navigating the Political Landscape

### Overview:

Creating an Service and Support strategy, aligning it with the corporate strategy and selling the business case to senior management is all in a day's work for Support Leaders. The hard work begins way before the actual presentation and success will depend how well you navigate the political and influential landscape – both horizontal as well as vertical. Often invisible, yet potentially a barrier - the art of selling and influencing the decision-makers, stakeholders, technologists, account managers and business analysts to buy-into the Service and Support strategy depends on your ability to work behind the scenes, establish relationships with stakeholders and close the deal. An integral part of this 'behind-the-scenes' strategy is collaborating with others to create the business case for investing in the strategy. The business case is a critical tool for justifying investment in technology. The business case creates a formal check and balance to ensure that the proposed investment is aligned with the strategies of the organization. The business case is a proactive and strategic way to build consensus, relationships and present the potential for business impact on operations, business processes, people and results.

### Key Issues:

- Selling them on 'their' idea
- Behind the scenes consensus building
- Sponsorship is critical at the business level
- Effectively communicating your strategy both in and out of the boardroom

## “Understanding ITIL”

### Overview:

IT executives face a great challenge when attempting to improve business processes, while also reducing the risk of new IT investments. In order to become more efficient with less risk, companies are relying more and more on industry-recognized best practices. By utilizing ITIL, you can reduce the time it takes to understand enterprise best practices for managing IT operations. Having the advantage of not being tied to a specific company or group, ITIL gives you a standard format for documenting a plan to elevate IT performance in support of your business.

## “Career Opportunities for Support Professionals”

### Overview:

Mark Twain said, "You can be on the right track and still get run over by a train". To prosper in a world of increasing globalization, fierce competition, downsizing, outsourcing and offshoring, support professionals must focus on differentiating themselves with a value proposition. It is important in today's business world to continuously improve your skills to meet market demands. The importance of IT within the business is unquestioned – the importance of IT and support professionals continuing to build their business acumen, communication, financial and leadership skills should be a high priority! Pete will speak on acquiring the right skills and experiences to become a value-add to the organization. Support professionals and leaders need to broaden their scope of services and create expanded opportunities for their staff. Support professionals today



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must be the "CEO of You" and treat themselves and their careers like their own business. Pete will cover topics like networking, continuous education, achieving and communicating results.

### “Creating Valued Services”

#### Overview:

Stop dimming your own star! Most Service Desks are currently providing hidden business value that is unfortunately transparent to their customers. There are plenty of Service Desk success stories to go around – they're just not being shared with the right people (customers and senior executives). **Your mission** – to deliver business impact services daily improving the productivity of your customers. This half-day session will challenge you to review and assess your services catalog, rate and rank them, determine which to deflect, eliminate or source and how to hunt down new, funded and strategic services and projects. Service Desks should be creating and communicating value always – to all stakeholders.

#### Benefits of Attending:

- Learn to operate your support operation like a business delivering cost-effective, best practice services to your customers.
- Understand how to ‘win’ more strategic and funded business while deflecting, automating and eliminating targeted call volume.
- Focus on expanding your scope of services to include business-valued services that gets business results.
- More easily engage senior management to champion the Service Desk as the SPOC for all IT products and services.
- Learn to create a marketing and communication plan emphasizing business value to your stakeholders.

### “Delivering Customer Service Excellence – All the Time!”

#### Overview

You must believe that to exceed customer expectations, we need to put ourselves in our customer's position. Additionally, we need to perfect the delivery of best practices daily with every customer on every opportunity. Pete will passionately challenge you to focus on what you want the customer experience to be, and then use all of your skills, experiences and training to ensure that it is consistently delivered.

The presentation will explore a recent customer's perspective of good customer service - "**A customer defines good customer service as how they perceive that an organization has delighted them, by exceeding to meet their needs**". In the end, there is no truth, only perception. In the end, it is up to you to create the experience that the customer pre-defined. Customers deliver clues all the time to what their customer experience definition is – you just have to learn to actively listen and anticipate every step. Customer service excellence is achieved when good communication skills meet a sense of urgency and an understanding of who and what they are supporting. By constantly practicing, improving, and refining the art and science of communications at every opportunity, your ‘**moment of truth**’ in every customer interaction will be successful.



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### **Achieving Strategic Leadership Thinking**

**FLASH! It's hard to think strategically while your too busy delivering tactically!**

#### **Overview:**

Achieving Strategic Leadership Thinking requires time. It is also dependent on your ability to empower your team to manage the day-to-day operations. As you shift your focus from managerial tasks to creating your aligned support strategy for delivering valued services, you must enlist the support and buy-in of key stakeholders. You will learn first to make the time, make the plan and lead the execution of continuous improvement roadmap. Achieving Strategic Leadership requires that you open your mind and yourself to new ideas, take risks and expose yourself to new learning experiences. "Readers are Leaders" is the mantra for the strategic thinker, who can envision the end and communicate a clear and simple vision and strategy.

#### **Learn:**

- Proven Time Management techniques
- Differences what Managers do and what Leaders do
- Leadership Best Practices
- Thinking and focusing on big impact initiatives
- Selling your ideas, strategies and business case to senior management

### **Executing a Successful Knowledge Management Strategy**

#### **Overview:**

Successfully implementing a Knowledge Management strategy is not easy. Lessons learned over the years from Support leaders speak of executive sponsorship, integration with current support operations and tools, creating self-service knowledge as well as measuring success and ROI of knowledge article utilization. Knowledge is king only if it impacts productivity and profitability. To ensure Total Contact Ownership, integrating knowledge into the support operations and problem resolution is critical. Creating and implementing Knowledge Management strategy is not an option in today's support environment where demand continues to increase and resources continue to shrink.

The success your Knowledge Management initiative could be greatly enhanced by joining us for a tactical approach to executing a successful Knowledge Management strategy. You can't manage or report the success and impact of your Knowledge Management strategy if you don't have the ability to measure it. Join us for this exciting seminar series focusing on successful Knowledge Management strategies and plans to integrate tools, process and people driving performance and financial metrics. You will learn how to:

- Successfully execute your KM strategy by resolving the support opportunities at each Tier enhanced by best practices in publishing, utilizing, measuring and improving your knowledge articles.
- Successfully identify your knowledge audience and how they solve their own problems, answer their own questions or increase the quality, consistency and productivity of support professionals who solve more problems on first contact.
- Successfully leverage all of your support tools, especially case and knowledge management tools to decrease support costs and improve employee productivity
- Successfully control resolution, seamless escalation and quality monitoring of the customer experience regardless of the customer access point.



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## **Implementing ITIL Service Desk Best Practices – A Case Study Approach**

### **Overview:**

Improving and standardizing the management of the IT infrastructure in a business-relevant way is high priority for all IT organizations. ITIL Best practices serve as a guide to designing IT management processes that increase the overall efficiency, reduce costs and align IT with the business. At the core of ITIL Service Support is the Service Desk, the single point of contact for Customers and Users. The function of the Service Desk is crucial to the success of any IT Service Management initiative. Join Pete (McGarahan & Associates) and his Clients as they present a case study focused on real experiences, lessons and results in building a best-in-class Service Desk. Companies today are leveraging the Service Desk for marketing and communication, the reporting and handling of all incidents and coordinating problem and change management. They will relate their corporate experiences highlighting what worked, what didn't and what they have learned from others that can work best for you and your implementation of ITIL and the Service Desk.

## **How to Gain Senior Management Buy-In**

### **Overview:**

Pete McGarahan facilitates this focus group for support leaders on how to get senior management support and buy-in on the value proposition of the support organization. Performance alone is not enough! You must communicate with senior leaders and engage them in your success. If you do, you will gain the visibility you need to demonstrate your value, and you will accomplish great things. If you don't, you run the risk of being made obsolete by one decision or budget cut. Discussion topics to include:

- How to set a course for positive change and impact by engaging senior management in your function
- Understanding the power and influence senior management has on your ability to be successful
- How to engage executive leaders in your role as a Chief Customer Advocate - doing the right things for your customers, your team and the company
- How to eliminate emotion from your discussions and focus on the facts, data, impact and results
- How to market and communicate to senior management using the 'Support Story' and 'Elevator Speech' techniques

## **Doing Taxonomy Right – Lessons Learned from Too Many Tool Replacements!**

### **Overview:**

Taxonomy or Categorization is the key to success in automating your Case Management Tool to work for you rather than against you. The single root cause that prevents Service and Support organizations from reporting regularly, automatically and meaningfully is that their categorization is either too general or too simplistic.

From a 'best practice' perspective; categorization drives and automate most of what is important in a Help Desk tool. It will drive your root cause analysis (RCA), which on its own makes it worth



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taking the time to think about doing it right and then putting change procedures in place to ensure that it stays right. RCA, which is critically dependent on categorization, is the 'feeder system' for Trend Analysis reporting, High Impact Training (80%-20% rule), creation of resolutions for Knowledge base, Call deflection and Problem prevention strategies, self-service and feedback loops to better end-user training and educational programs. Most Help Desk tool vendors will tell you that their systems are data-driven. This is an understatement. I stress to all of my clients to plan the implementation of the tool carefully, paying special attention and detail to categorization. Why? Because most of the functionality of the tool is driven by categorization. If you cannot do categorization right – it impacts all of the other functionality, automation, workflow and process mapping. The end-result is a tool that will never live up to the ROI promised and will always be an impediment to the Help Desk's ability to perform problem, request, change, asset management as well as problem resolution. In the life of a transaction, it is categorization that determines severity level, drop-down questionnaire for specific type of problem, quickest and most direct route to Knowledge base, Tier-2 escalation team or person, notification list, special dispatch instructions and launch transactional survey.

### **A Realistic Approach to Creating A Disaster Recovery / Business Continuity Plan for Call Centers**

#### **Overview:**

Gartner states the main reason organizations have business continuity and a disaster recovery program is to maintain customer service. It is necessary, to have detailed, well-documented steps needed to recover from a disaster to return Call Center operation ASAP. All agencies must conduct a Business Impact Analysis (BIA) to understand where investments in policies, procedures, equipment and a "hot Site" must be made to recover from any unforeseen disaster event.

As we integrate the various customer interaction channels like phone, web and email, we increase the dependency, importance and vulnerability on this single point of failure. Do you have a plan? Developing a plan that reflects the level of importance of accessibility, availability and importance of your Call Center operations is critical – make sure you mind the costs, risks and customer impact of downtime.

- Learn how to conduct a Business Impact Analysis (BIA)
- Learn how to use the BIA results to formulate your DRP and BCP
- Learn how to establish your Call Center as a Crisis Management Center

### **Driving Problem Elimination Through Root Cause Analysis**

#### **Overview:**

The most common approach when problems occur is to identify the symptom and provide a solution as quickly as possible. Unfortunately, this knee-jerk approach often results in addressing symptoms of a problem, not the actual problem. Many support professionals view their purpose as fixing problems. Being in a support role makes it easy to slip into reactionary mode, however the best support practice is to look for patterns to prevent problems from occurring.

Root Cause Analysis is the process of identifying root causes of undesired problems and devising a long-term corrective plan of action. This presentation is designed to provide support professionals with the skills and knowledge to successfully perform Root Cause Analysis. As a



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result, costs savings to the organization are realized through proactive methods for identifying and eliminating repeat problems.

Participants will learn the purpose of Root Cause Analysis as it ties to cost savings and increased customer satisfaction. Participants will also learn about problem solving tools for analysis, how to analyze data, as well as ideas for measuring the effectiveness of Root Cause Analysis.

This information packed, hands-on presentation provides a learning environment that engages participants and invites them to participate. Dynamic presentation and significant group interaction result in a powerful and comprehensive learning experience.

### **Call Reductions Strategies - That Work!**

#### **Overview:**

It is critical to create a detailed support strategy that includes reducing targeted call volume. It is imperative for your Enterprise Support organization to reduce current call volume to improve financial and operational performance metrics. Additionally, your team can be repositioned to handle more strategic, value-add and business critical types of issues. We will discuss the required best practices - Root Cause Analysis – that need to be implemented before you can effectively and consistently reduce your call volume. To build the business case for implementing a call reduction strategy, you must first utilize your call categorization data to know what types of calls should be targeted for reduction/elimination. We will talk about a number of call reduction programs that have been successful in achieving their call volume reduction goals including:

- Self-service and redirecting customers from the phone to the web
- Customer training programs
- Utilizing Root Cause Analysis for problem determination, elimination and deflection
- Utilizing IVR beyond skills-based routing
- Support Automation, roll-back, backup & restore
- Communication strategies during outages

You must proactively and methodically identify why are customers are calling and look for ways to reduce and eliminate these repetitive phone calls. Please join Peter McGarahan as he presents a methodology, action plan and case studies for successfully reducing call volume. Senior executives are already asking for this – surprise them - present your call reduction strategy today before they have to ask for it!

### **Leadership + Empowerment = Results**

#### **Overview:**

Leadership is the key to getting the support organization well positioned in supporting what's important and highly valued by the business and the customers. It takes a strong, aware and assertive leader in today's business economy to rise above the rest and differentiate the value of the support organization from the others. The support leader must create and articulate a support strategy aligned with the business goals and deliver against a tactical operational plan that leverages support best practices, current state-of-the-art tools and an empowered team. The support leader must also run the support organization like a business deploying best business practices to delivering highly valued services at the most cost-effective pricing. The delivered results needed in today's organization will only be achieved with Leadership that can sell the business on the value of the support organization and a empowered team that deliver on the



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promises on a daily basis. Lessons on leadership and empowerment will be discussed in detail as it relates to:

- Relevant and practical leadership skills
- Empowering your team by not being a bottleneck and getting out of the way
- Roles and responsibilities of the leader and the empowered team
- Basic steps to get started for immediate results
- The successful secrets of other support leaders and their results

## Help Desk Technology, Trends and Directions

### Overview:

Help Desk Technology is a key enabler for support organizations to provide the business with a seamless, single solution that manages and resolves their requests and problems in a timely fashion. There are certain technologies that are essential to the Help Desk so they can continue to mature to a valued, business-focused partner. Today, more than ever, making sense of the tool market place, vendors and their products is no easy task. There is confusion, a trust issue and lack of funds being invested in the Help Desk tool market place today and there are and will be consequences that follow as a result. This session will focus on the current state of the Help Desk Technology market, paying close attention the vendors, products and what are the highlights over the last 6 months that affect you, your business and your customers. We will also cover where Help Desk Technologies will be heading in the future and how you can best prepare yourself for their arrival. We will not forget that automating the manual is essential to success and growth, but certified people and great process mean the difference between good and great.

### Topics covered:

- The current state of affairs with the Help Desk Tool market place
- The future direction of Help Desk Technologies and what you need to do to prepare yourself
- The key to evaluating Help Desk Technologies that get you the biggest bang for your buck
- The best way to approach integrating different tools for maximum results
- The disciplined approach toward the valuation of Help Desk Technology investments measuring progress toward specific, quantifiable goals
- How to effectively leverage the Business Case to financially justify your Help Desk Technology investments and linking them back to business benefits
- The key to creating ROI for these Technology investments

## Marketing your Support Center's Value Proposition to Senior Management

### Overview:

Marketing your Enterprise Support Center is something that needs to happen at every level; every day, in every customer interaction and in every meeting with your senior officials. We have to constantly be on the hunt for new business that will continue to add value to the business. "If you don't find ways to add value back to the business, you run the risk of being viewed as commodity and therefore possibly outsourced to the lowest bidder." Whether you are launching a Support Center or changing the image of an existing one, you must communicate value and



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continuous improvement to senior management and customers alike. Support Centers, which successfully market themselves, are seen as an integral part of the business, bringing new levels of respect and investment value. This session will show you how to create a marketing and communication plan, which targets different key value messages to uniquely different audiences yielding fantastic results! It will also examine the best ways to measure the true effectiveness of your program, understand your customers, leverage industry best practices, and manage customer expectations within your service level agreements.

We will explore the methods and value of:

- Identifying what type of support is value-added for your customers
- Strategically aligning your Support Center with today's critical business drivers
- Marketing your Support Center alignment with your business's goals and objectives
- Selling, marketing and communicating strategic value to your senior management
- Process reviews which ensure efficiency, cost-effectiveness, and consistency among all customer access points
- Marketing self-service - how to build it right the first time so they will come again and again!

### **Developing Better Trouble Shooting Skills for Increased First Contact Resolution**

#### **Overview:**

The overall goal of a Support organization is to eliminate problems from impacting the business and employee productivity. As more cases are not closed on first contact the cost to the support organization and the business grows considerably in terms of resources expended, lost productivity, customer dissatisfaction and lost revenue.

Problems come in all shape and sizes. They afflict all types of enterprises and teams. Very often, their impact on the business and customers is also very critical to its success. These problems need to be resolved one way or another and eventually eliminated. But what are right questions that uncover root of the problem and resolve it quickly, completely and consistently? What is the customer's role in all of this? How can we automate this process to minimize the guesswork and ensure accuracy of the facts?

According to research conducted by Morris & Rouse on troubleshooting, they concluded that the most effective way to ensure that a troubleshooter will employ a certain strategy is to proceduralize the task. However, the single most important factor in troubleshooting training is extensive practice with feedback using actual or simulated systems. This Webinar is directed at all Support professionals who are problem solvers; we will cover some basic and advanced skills in troubleshooting, diagnosing and resolving problems. For example, rule out the obvious first, always double check all of your facts and don't assume that input from others is 100% accurate.

Join us for this very practical and tactical presentation where you will learn:

- The four key steps in trouble shooting and problem resolution; diagnosis, issue determination, resolution development and resolution delivery.
- Successful best practices for enhancing your team's diagnostic and trouble shooting capabilities through better training, quality assurance, tools and coaching
- How to leverage real-time data and information to the benefit of the customer
- Why a better business sense of urgency will improve the image and perception of the support professional and organization



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### Running Support Like A Business

#### Overview:

Supporting the goals and objectives of the business can only be accomplished if the support organization is run like a business. The support leader must assume the role of a CEO of this mission-critical business that focuses on providing value-based services to the employees, partners and customers. The CEO must align the support organization with the business drivers and continually look for new ways in which the support organization can provide value-add services. The CEO must focusing on the cost structure of what it takes you to deliver these services as well focusing on what call types are being handled by your professionals and what you intend to do with them to lower the overall cost of support. This maturity of your support organization is key as to where you are on the roadmap to achieving a business-focused and business-operated support organization. Pete McGarahan will leverage his experience as a former Infrastructure Services director for PepsiCo and Taco Bell and gives new insight into the concept of the Management Portfolio for CEOs of support organizations. Please join Mr. McGarahan for a business-focused view into running your support organization like a business.

Join us for this presentation where you will learn:

- Understand your new role as CEO of your Enterprise Support Center and how it relates to the impacting variables that are constantly changing
- Learn how to target the "strategic" drivers of your organization and then align your support strategy around them to provide value to the organization
- Learn what new skills that are mandatory for you as the CEO of your business will need to master to achieve best practices and a support profit center
- Learn to deliver industry best practices, products and certifications to your support organization for maximum impact
- Learn to manage you support business with the Balance Scorecard approach to reporting

### The Support Industry's Best Practices

#### Overview:

As a leader in the support industry, Pete McGarahan has created, practiced and shared these support best practices with the business and support community. These best practices have been instrumental in moving the Help Desk from the back office to the front office. Today, support organizations must focus and lead with business-focus and IT service management best practices to provide value back to the business.

These Support Industry Best Practices are designed to be a guide, a roadmap for leaders to implement based upon proven and quantifiable results. Results speak for themselves. Raise the bar on your support performance, service levels and value. It is your passion and commitment for support excellence that inspires your team and peers to 'buy-into' these best practices and makes them a vital part of their daily interaction with the customers. The intent of this presentation is that you will gain sparks of inspiration as you work to customize these best practices into your own organization, suited to meet your own specific support and business needs.

A few examples of these Support Industry 500 Best Practices:

- Knowledge Base Utilization
- Total Contact Ownership
- The Morning Report and the Balanced Scorecard
- High Impact Training
- Automated Password Management



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These Best Practices are:

- Designed to help address the challenges and opportunities that face Enterprise support organizations every single day
  - Designed to help you address the strategic as well as the day-to-day tactical issues of Enterprise support
  - Designed to be a roadmap and benchmarking tool as to the industry standard for providing best-in-class business-focused support
  - Designed to give you what you need to be the CEO of your support business
  - Designed to act as a catalyst for re-inventing your Enterprise support function providing business value
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Peter J. McGarahan is the founder and president of McGarahan & Associates. Pete is also the acting Chairman of the IT Infrastructure Management Association, a sister organization to HDI. Pete's value to the service and support industry and business is his thought leadership. As a practitioner, product manager and support industry analyst and expert, he has influenced the maturity of the service and support industry. His passions for customer service led the Taco Bell support organization to achieve the **Help Desk Institute Team Excellence Award**. IT Support News also named him one of the "**Top 25 Professionals in the Service and Support Industry**" in 1999. Support professionals voted McGarahan "**The Legend of the Year**" in 2002 and again in 2004 at the Help Desk Professionals conference for his endless energy, mentoring and coaching and his valuable contribution to the support industry and community.

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