

Knowledge Is Power

How Knowledge-Centered Support and the ITIL Framework
Can Transform the Service Desk

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IT departments are always on the lookout for new technology—the “next big thing” that will save time and money by making service desk tasks faster and easier to perform. These solutions are always around the corner, always promising lots of ingenious functionality. But as great as many of them are, they can’t provide the one thing IT departments need most: Knowledge. Seasoned service desk veterans are well aware that having access to effective knowledge is at least as valuable as the solutions IT uses. In fact, many view it as the closest thing to a panacea—the only way a service desk can make the leap from reactivity and constant firefighting to proactive problem prevention.

It’s All About Connecting the Dots

Naturally, most service desks out there are operated by people who know their stuff—professionals with lots of experience and many with official certifications. But the type of priceless knowledge that’s often overlooked is the nebulous, context-rich know-how that’s intertwined with and completely inseparable from the type of environment customers operate within, the type of infrastructure IT has to work with, and the types of tasks both must perform. In short, it’s the collective knowledge and wisdom that IT personnel have acquired by responding to and addressing the problems specific to their environment and their customers’ needs. Many organizations come to view knowledge packs from content providers as a workaround. But, though knowledge packs are good for generic product support, they still don’t provide help that’s specific to your environment and needs. That means they will be of limited efficacy in resolving your biggest incidents.

One may ask how this knowledge could possibly be overlooked when it’s ensconced in the minds of the very people who are enlisted, day in and day out, to help service desk callers resolve these issues. But that’s the very problem: At many—if not most—service desks, situation-specific gems that could benefit the entire department are locked in the heads of whichever employee happened to be around when a solution was discovered. Time-saving application shortcuts learned by power users over countless hours on the job often don’t get

shared with new hires because everyone in the department is firefighting, trying to resolve the next incident as fast as possible. Likewise, knowledge about a proven diagnostic sequence, tricky steps associated with installing an operating system, or background on why a specific tool or policy has been selected by the enterprise doesn’t get passed on to every member of the team.

Failure to capitalize on collective knowledge exacerbates problems that have been endemic to the service desk for far too long:

1. **Longer resolution times** – Redundant, needless research inevitably clogs call queues and prolongs resolution.
2. **Inconsistency** – Researching a problem every time it arises instead of using a single, tried-and-true solution compounds problems and yields mixed results.
3. **Low morale** – The repetitiveness of less-efficient service desk methods inevitably takes a significant toll on the morale of service desk personnel.
4. **Loss of knowledge** – When service desk staff members leave an organization that has failed to capture the knowledge they accrued on the job, the enterprise experiences an increase in costs and loses precious time and energy as it trains new employees.

A Revolutionary New Methodology

The fix to these wasteful, lost-in-the-ether scenarios is to adopt knowledge-centered support or KCS (visit <http://www.serviceinnovation.org/> for details). In a nutshell, KCS is a methodology for building an effective knowledge management system as a by-product of day-to-day support activity—a centralized repository of learned best methods and information about common issues and their vetted, authorized solutions. KCS ensures that lessons learned once are accessible to all IT personnel, regardless of time of day and irrespective of whether the employee who first solved the problem has left the company.

The knowledge that’s stored in this repository shouldn’t just be URLs to online sources or information cut and pasted from articles or public discussion threads. Although knowledge from those sources will certainly be part of the equation, that’s just the beginning. The centralized repository must contain

information specifically tailored to how things work at your organization, taking into account when, where, why, and how things were addressed the way they were.

Ideally, this knowledge management system should be part of the initial design of the service management strategy rather than an afterthought—but, of course, it's never too late to adopt a more efficient and practical approach. However, incorporating KCS into the earliest strategy iterations is preferable because the knowledge management system will directly impact your incident management interface design. Further, knowledge management also must be seamlessly incorporated into the resolution workflow. Otherwise, personnel are likely to view chronicling problems and solutions as a separate, optional step that they can skip or discontinue if they're busy. In addition, any solution used as part of a knowledge-centered service desk should not only make recounting pertinent information fast, easy, and searchable by integrating it into the entire support process, but it should also enable a defined workflow or process behind the creation of knowledge itself.

Of course, knowledge itself isn't perfect—it doesn't always work in different environments. That's why a good knowledge solution should facilitate collaborative input. It should provide all service desk personnel with the opportunity to score the effectiveness (automatic or manual) of prescribed measures and add comments that explain how they arrived at those conclusions.

Yesterday's Buzzword or Tomorrow's Standard?

Some may be tempted to dismiss knowledge-centered support as a fad or a gimmick, perhaps even citing statistics about how many incidents their department resolves as proof that such a methodology isn't necessary. However, closer examination of these incidents will likely reveal that an inordinately large number of them may be of a similar nature. A detailed analysis of these incidents is likely to show that adopting KCS would save the enterprise time and money because IT would only need to research incidents once rather than every time the issue arises. An effective knowledge-powered service desk will see a reduction in the number of incidents resolved by analysts, and thus even a slight increase in average resolution time—because the easy, repetitive stuff has been removed or addressed through self-service. To counter that, an increase in customer satisfaction is the true assessment of ultimate effectiveness.

This increase in IT productivity and efficiency then becomes

a boost to the overall value of the enterprise. It's for these very reasons that the US-based organization Help Desk Institute (HDI) and corporations like Oracle, Verisign, and HP have become avid supporters of knowledge-based support. Part of the reason these organizations stand behind the idea of knowledge-centered support is that it aims to get the right information into the right hands. For instance, in the service desk environment, knowledge can be designated as only for first-line responders, thus ensuring that first responders get what they need and also that second-line responders don't get inundated with irrelevant information that impedes their ability to find what they need. In other words, KCS-friendly solutions don't just hold the right information—they make it easier to find, use, and manage it.

Technology Solutions and What ITIL Doesn't Tell You

The previously mentioned organizations aren't the only ones proclaiming the benefits of knowledge-based support. Version three of the ITIL guidelines discuss the importance of knowledge management as part of delivering operational services required by the business. In particular, it highlights knowledge transfer, recording of troubleshooting measures, and flagging of known errors. However, ITIL v3 makes no mention of how organizations should achieve these goals. That is, it doesn't prescribe a method for building knowledge. For instance, some enterprises may resort to a Web-based resource such as Wikipedia or purchase a stand-alone system, both of which practically beg to be sidestepped in the rush of everyday incident resolution. KCS fills the gap and tells you how to generate the knowledge, but executing on that knowledge still requires a solution and toolset that combine ITIL service management with powerful knowledge management abilities.

To ensure that knowledge creation is achievable and beneficial, organizations must make sure that their service management solutions have knowledge abilities that are:

- **Created automatically as an analyst progresses through an incident** – Knowledge is a byproduct of following the established incident process.
- **Easy to maintain** – Initial steps of knowledge documentation must not only be self-explanatory and easy to complete, but even more importantly the stockpiled information must be easy to keep up to date so the repository doesn't become a graveyard of antiquated anecdotes.
- **Process driven** – Knowledge must be methodically and reliably authorized, checked, and end-of-lived.

- **Consistently and collaboratively reviewed** – IT must set a review date based on recent updates, effectiveness numbers, and discussion threads in order to determine usefulness. Further, the knowledge should be decommissioned if it proves ineffective or outdated.
- **Adaptable to all the necessary audiences** – The service management solution must be able to deliver the right knowledge to the right people.

Conclusion

Transforming the service desk from a reactive operation plagued by unnecessarily long queues and redundant issues into one that's proactive, nimble, and a valuable business asset, *is* possible. In fact, it's remarkably easy as long as IT adopts the appropriate elements of a KCS methodology (and possibly the ITIL framework) and secures a toolset that facilitates those concepts while allowing you to implement them gradually. Further, incorporating this holistic, collaborative new approach brings rapid gratification, with numbers of incidents in the queue plummeting and customer satisfaction skyrocketing in tandem with the number of knowledge articles created. And isn't that customer satisfaction what service desk is really all about?