

Setting up a Help Desk; Students learning from experience

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Obtaining employment on a Help Desk is often a “catch twenty-two situation” for students. Most advertised jobs in this area state “prior experience an advantage”. In a regional city, there are limited opportunities for students whilst studying to obtain experience working in the Help Desk environment, as being off campus impacts on the student’s other papers.

This paper reports a solution that was implemented at a regional Tertiary Institute to enable students to gain practical skills in the Help Desk area. Designed and carried out by students its objectives were to assist other students and staff for a limited period of time. Building a Help Desk from “the boots up”, gaining student “buy-in” and commitment, assuring equity of work all posed difficulties at times. However when evaluating the project the students reported no “insurmountable” problems, and recommended the learning process for future students.

Keywords

Help Desk, teamwork, Information Technology (IT) Support, Help Desk skills, Communication skills

1. INTRODUCTION

Help Desks, once only associated with Information Technology (IT) departments are now commonplace and offer a range of services for all sorts of products and services, from a vacuum cleaner to software or hardware. In the IT industry change has been constant since the first Help Desks were implemented and Help Desks have now evolved into consolidated service desks (Paquet and Brittain, 2003). Help Desks play an integral part in the business world and third parties are increasingly providing these services for organisations outsourcing their requirements (Czegal, 1998). The advances in technology, along with client’s expectations of service have increased the demand for employees with Help Desk skills (Beisse, 2001).

At this tertiary institute teaching processes for the Help Desk paper has included research, textbooks, review questions, software program exer-

cises and simulated projects, with an emphasis on communication and reporting skills. Exposure to actual Help Desks has been limited to students observing procedures and interviewing a person working on a Help Desk. Observing the Help Desk environment and staff completing their tasks allowed students to compare the theory they were learning with industry requirements. However, more and more Help Desk advertisements for jobs were asking for applicants to have experience and to be able to “hit the ground running”. To satisfy this requirement a different approach to teaching this topic was needed.

In this paper we present a study on how a small group of third year Degree students, with the guidance of their lecturer, planned and implemented a working Help Desk. By “Help Desk” we mean a Help Desk with a limited objective of providing assistance to staff and students relating to queries with the suite of Microsoft Office programs. We present the tasks the students undertook to complete the project; and the results learned from this experience.

2. BACKGROUND TO THE PAPER

A learning outcome for the Degree paper “Advanced User Support” was to *Report on current issues concerning the setting up and management of a Help Desk*. In the past the students achieved this outcome with a written report resulting from research, textbook theory, interviewing Help Desk personnel, and observation of Help Desks. Our reports provided valuable information toward the processes we were required to carry out when setting up our Help Desk.

2.1 Issues associated with gaining industry experience

Actual work experience in the industry in a regional centre proved difficult to arrange. The tertiary Institute had health and safety issues to consider when arranging visits to industry. Industry's rationale was that time spent training and/or assessing the students' abilities before allowing them to act on their behalf meant that the students could not work unsupervised. In addition, because they were studying other papers, it was difficult to schedule any length of time for the students to be present on the job.

2.2 Strategies to provide experience for students

Opportunities were taken to involve students in providing assistance to the public. Students assisted at the three day Careers Expo. This "on the ground" assistance provided first-rate experience for the students in customer service skills reinforcing the need for excellent communication skills. Student feedback indicated they enjoyed the experience and would welcome the opportunity to set up and work on a Help Desk. The lecturer, working from the student feedback, presented the idea to the Head of Department and gained permission to proceed with the project.

3. LITERATURE REVIEW

The Internet provides a good deal of information on "Setting up a Help Desk", with a large number of the New Zealand home pages tied back to advertising products or education services. Some New Zealand research is available on understanding the different types of Help Desk/Service Centres (McLay, 2003) however, we did not find any specific writing on the outcomes of students planning the services, and setting up an operational Help Desk at an educational institute. Most of the theory covered in class was from texts (Czegel, 1998, Beisse, 2001, Knapp 2003).

4. PROCESS

This project was designed to help students to understand current issues concerning the setting up and management of a Help Desk.

Cooperatively, the lecturer and students designed the two assessments containing both individual and group components as a basis for this project.

4.1 Gaining Student involvement

For the project of implementing a Help Desk to be successful the lecturer had to have student "buy in" and commitment. The project was discussed as being "available for the students" if they wanted to do it. The lecturer explained that it was a first at this Institute and they would be breaking new ground. The amount of work assessed for this project indicated it would only work as a team project. At the outset students had the option of choosing to participate in this team project or continuing with two individual assessments. All students chose the team project. To ensure the students "owned" the project the lecturer acted on theory from (Czegel, 1998:26) "There is only one rule for putting a mission together, but it's a very big one: Let the people who will be living it do it". With this in mind the lecturer encouraged the students to use their knowledge gained from theory and lectures to plan the required tasks to implement an operational Help Desk. The students determined the tasks that were required to set up the Help Desk and these tasks were reviewed and allocated to two assessments by the lecturer.

4.2 Resources available to set up a Help Desk/Service Centre

A small student study room was commandeered for a short period of time to house the Student Help Desk. This room was adjacent to the Studio, (a common computer facility area available to all students outside of class time), the students' classroom, and the lecturers' office. A "retired 486" computer, was set up in this room and connected to a network printer. Internet access was available for email and to research problem solutions. The office included a telephone; however services were limited to internal extension numbers only.

4.3 The assessment requirements

Ensuring the students had some "real-world" background for their teamwork; Assessment 2 was based on the tasks associated with the written report (as in past years).

Assessment 3 reflected the requirements of setting up and attending the Help Desk, problem solving and all the documentation of how and what was done.

5. THE PROJECT FROM THE STUDENTS' PERSPECTIVE

5.1 Observing the Help Desks in Industry

Four students participated in this project. To gain information we set up interviews with Help Desk personnel from an area health board, a local body, print media and the petrochemical industry. Although these industries varied greatly we determined they would have services and procedures in common, and ought to provide a good overall perspective of the industry.

5.2 The questionnaire

As a team we brainstormed ideas for questions for the interview. We all spent considerable time identifying the comparative points we wanted to make between the Help Desks. Our emphasis was on observation to gain answers that would assist us in our project rather than merely quizzing personnel. Our questions were in three broad areas. The first three questions focussed on examining theory in relation to what actually happened in industry, how the Help Desk evolved, its Mission Statement and physical layout. The next three questions examined staffing and skills required for the Help Desk. The remaining questions queried the functionality of the Help Desk, for example, looking at the common problem types, volume of traffic, priority/urgency criteria, "general" resolution rate, and the resources and methodology for solving problems.

5.3 Analysis of the information collected

The information collected from the interviews was qualitative. It was our individual interpretation of the answers to our questionnaire and the observations we each made while visiting our chosen Help Desk.

6. RESULTS

Following the visit to industry we compared our answers and discussed the points that would be relevant to us when setting up the Student Help Desk.

6.1 Help Desk: Theory vs. "real life"

The Help Desks we visited differed greatly in type, size, and function (McLay, 2003), and we discovered that in some instances real life differed to theory. None of the Help Desks visited had their own Mission Statement; rather they used the IT Department Mission Statement. Our text defined mission statements as a "list of guiding principles that communicate the goals and objectives of a support group to its staff, users and management" (Beisse, 2001:19).

Interpersonal and communication skills for Help Desk staff were valued highly. Without exception the Help Desk Managers stated that soft skills, i.e. communication (written and oral), adaptability, analytical thinking, problem solving, were attributes that were looked for when hiring staff before generic information technology (IT) skills. We were expecting to hear that IT knowledge would be a preferred quality, despite what our lecturer told us about the importance of communication skills. It is noted (Thomsen-Moore, 2002), that IT staff are usually happy to take training providing it is technical training, whereas "soft-skills" training is not received with the same enthusiasm.

As expected, the functions of the Help Desks we visited varied according to the specific needs of each business, however, the focus was always maintained and priorities assigned to what was required to keep each business operating smoothly. Weinschenk, (2002) reports the vital overall effort must centre on the corporate business goals and customer relationship management (CRM).

Three of the Help Desks we visited had unlabeled entrances and discouraged the personal approach, preferring email and the telephone. "Nearly one third (29%) of all Help Desk organizations reporting stated that support staff spend 90 percent to 100 percent of their time on the telephone; 7% said telephone duty is limited to 40 percent of a work day. The overall average for telephone time was 80 percent of the workday". (Levene: 1998:4)

Students, by observing industry Help Desks and researching literature on the topic, were able to gain perspective on the difficulties and rewards of setting up a fully operational Help Desk.

6.2 The skill set of our student team vs. the needs of our prospective clients.

We needed to evaluate our skill strengths to assist in defining and limiting the services we would offer on our Help Desk. We were all accomplished users of the Microsoft (MS) Office Suite. We determined a large number of our “customers” would also be using the MS Office Suite programs in the Studio. We therefore decided to limit our services to problems associated with the MS Office Suite.

6.3 Our target population profile

Our customers came from a variety of Departments. Students using the Studio were from the Nursing, Business, Community Courses, and the Computing departments. Skill levels using Microsoft Office ranged from novice through to expert users. Although we included the lecturers and administration staff as our clients we did not make an evaluation of their skills.

6.4 Preparation of documentation for the Help Desk

First we prepared our Mission Statement, logos, and all of the required documentation for logging and recording problems, together with our customer survey forms, and posters to advertise the Help Desk. We also prepared a telephone answering procedure, and questions to help the customers explain their problem. We did not have sufficient time to design and implement a purpose built Help Desk database to log problems and solutions; instead we used skills learnt in earlier papers to design alternative processes in MS Word and Excel. (Spencer, n.d.)

6.5 Setting up an email address for the Help Desk

Obtaining a free email address to meet our needs involved considerable trialling of free e-mail services that were offered via the Internet. We discovered all free services were not equal. Many services required a user to re-login to check emails as re-

freshing was not permitted. With some providers a considerable delay on sending or receiving emails was encountered (up to six hours) or words were restricted in the username i.e. Hotmail would not allow the word “help” to be used. We finally settled on using techmail.com as our address as this service met all our needs. It accepted the name chosen for our Help Desk and did not have limitations on sending and receiving attachments.

6.6 Testing of our services prior to going “live” on the Help Desk

Testing procedures was critical to the success of our Help Desk. We utilised role-play skills to trial procedures and protocols we had designed. This helped to head off issues that would have caused major problems had they not been identified. For example, getting a log-in did not give internet access privileges; this was recognised during role-play on the last day before going live. Lessons learnt through simulation were extremely beneficial. One student noted it was easy to write a welcome message for answering the phone, but it was another matter to answer the phone reciting the message as it no longer “flowed” when actually talking to another person. Role-play brought home the necessity for thorough preparation.

Discussion of past experiences interacting with Help Desks, whether an IT Help Desk at an educational facility or an information desk at the local bank, department store or doctor’s surgery highlighted how we like to be treated. As Knapp (2003:21) reminds us,

“...when customers – living, breathing human beings with feelings and expectations - contact the Help Desk for support, they expect to be assisted by competent, friendly and efficient people”.

6.7 Staffing the Student Help Desk

As we were situated in a “prime” position, easily seen by students using the Studio, it had been decided that two students would staff the Help Desk. This would allow for one to deal with emails or telephone problems and the other to assist with face-to-face enquiries. Our student Help Desk was available 12 noon to 1pm, four days a week, for two weeks. Although emailed problems were solved outside these times to clear backlogs.

6.8 Marketing our Help Desk

One week prior to becoming operational, we put up coloured posters advertising our Help Desk. We wanted to make sure other students (and staff) knew of the services we were going to offer. After all we had only a limited amount of time that the Help Desk would be operational. Two days before the Help Desk was due to start our lecturer sent an email advertisement all IT students in the Computing Department and to all staff at the Institution.

We opened our Help Desk expecting to receive “lots of problems”. However, by the end of the first session it was apparent more promotion and inducements would be required to gain customers. On day two of operation we highlighted our presence with balloons and streamers. We offered lollipops and sweets in return for problems to solve.

The location of our Help Desk (adjacent to the Studio) encouraged person-to-person contact. We soon learnt why personnel on industry Help Desks discouraged this contact as too many distractions resulted in difficulty in clearing problems.

6.9 Use of the student Help Desk

Users of the Help Desk varied from community course students to third year degree students and staff.

It appeared some customers tested our service and after their problems were solved to their satisfaction they returned with problems that had been a concern for some time. By analysing the problems we solved it was possible to identify program functions and features that a number of students required assistance with. For example some of the “programming” students were unfamiliar with required software application functions and features. We saw a need for these procedures to be made available via the student intranet.

7 DISCUSSION: RESULTING FROM THE STUDENTS’ PERSPECTIVE

7.1 Students comments on the project vs an assignment

When we students receive an individual assessment there is a level of comfort knowing the dead-

lines, having clear requirements and having a lecturer available to clarify problems that may arise. Our Help Desk project changed that. We students were deciding the criteria for success, the resources and “running the show”. This gave us the perfect opportunity to get a taste of Help Desk workloads, pressures and rewards. We all commented on gaining satisfaction from the experience and exhilaration at helping others solve problems. We considered our project to be an excellent learning tool.

We also experienced the ‘human factor’ of dealing with clients with their own deadlines, poorly communicated problems or a client’s inability to follow “simple” instructions. This project gave us all valuable experience in dealing with individual needs and stressed the importance of good interpersonal and communication skills.

7.2 What worked well on our Help Desk

Generally it was agreed that the Help Desk forms we designed were efficient, easy to fill in and file for quick reference. If a problem was not solved immediately a standard email reply was sent to keep our customer informed of our progress in solving their problem. All problems had to be solved or escalated within an eight-hour window. Having two persons staffing the Help Desk meant if one person was called to the Studio to help a customer, the other person could continue solving emailed problems.

7.3 What could be improved on our Help Desk

A problem occurred when one student failed to show up to staff the Help Desk and did not notify either the other team member on duty or the lecturer. This could have proved disastrous had a third team member not been available to step in.

Initially client problems were slow in coming to the Help Desk. Sweets were given out in the Studio and extra emails were sent to IT Students and all staff to encourage the use of the Student Help Desk. This worked so well that closing the Help Desk at 1pm then became difficult. We had to continue working on problems outside of the predetermined hours.

Generally, we all agreed that the physical location of the Help Desk could be improved upon if it was moved into an area away from the Studio. This

would result in fewer distractions and interruptions and more time to solve problems.

7.4 Honouring team commitment

There were times when team members did not meet their commitments on the due date and this caused us problems.

Conversely, teamwork skills were highlighted when the Help Desk was 'live'. No issues were escalated to the Institutes' Help Desk. Instead we quickly identified the skills of our teammates, pooled our resources and solved the problems. When support was sought it was invariably given as a suggestion rather than an inflexible solution. Learning to acknowledge each other's differences, strengths and weaknesses isn't always easy. This is not an environment many students can test themselves in so the Help Desk project was a beneficial skill building exercise for us.

7.5 Evaluating the Help Desk as a learning experience

We students considered that implementing and staffing a Student Help Desk was an excellent project for those completing the User Support paper as it provided us with a 'taste' of what a Help Desk could be like. This experience allowed us to make decisions as to whether this was a possible career path to follow.

7.6 Limitations

This study was conducted with only one team of four students. We investigated only a small sample of Help Desks. The sample restricted our ability to make generalisations on some aspects of integrating theory (for example mission statements) with real-life situations.

These limitations however may provide opportunity for further study and comparisons in the future. Future information gaining may centre on a survey to explore the skills required in the various Help Desks in our province.

8. CONCLUSIONS

In this paper we presented the results on how a small team of third year Degree students planned and implemented a Help Desk to satisfy the required outcomes of a Degree paper. We interviewed a limited selection of diverse Help Desks to assist us

compare what we learned from research and theory with real-life situations.

We students had to face the reality of what we could expect in industry. We accepted the responsibility of working as a team to complete the project, and as a result had to compensate when team members did not meet their commitments.

Usually questions asked in assignments are well weighted and communicated by lecturers; this was not the case for us students who were staffing the Help Desk, instead we had to "untangle" problems in order to solve them. We had to remember at all times the customer's needs were our prime concern, and they must be treated with courtesy and consideration at all times. This reinforced our need for good communication and interpersonal skills.

Our lecturer in allowing us to design the assessments encouraged us to own the assessments and ensured commitment to carrying out the tasks. Whilst there were times when our lecturer was apprehensive as to the progress of the project, and the continued commitment of us all, the outcome was considered to be very successful. We students recommend our experience as an excellent learning tool, and suggest that this project be continued so that future students can benefit from 'real-life' practice.

Don't tell people how to do things, tell them what to do and let them surprise you with their results. George S. Patton.

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