HELP DESK AUTOMATION: A BEGINNER'S GUIDE

If your help desk is not employing every possible option for automation that's available, you are missing out on opportunities to:

- Improve productivity
- Increase customer satisfaction

With readily accessible tools to automate common, repeatable tasks undertaken by the help desk, I find myself shaking my head when I see so many—particularly in small to medium businesses—that have still not taken advantage of available technology solutions.

Here, I'll introduce you to help desk automation, from why and how to start building your investment case to choosing automation tools.

What is help desk automation?

Automating your help desk means using software and artificial intelligence (AI) to support customers with their questions or problems. Automated help desks use technology to streamline workflows by taking care of manual tasks and systems work, making it possible to provide a faster, more helpful response to every customer, at a lower cost.

Your help desk's current state

Do you still manually reset passwords and unlock accounts? Do you spend time assigning access rights to folders and applications? Do you manually assign and prioritise incidents and service requests?

If you do, I have one question: Why?

Automating these tasks removes the drudgery from your help desk analysts and allows them to spend more time resolving more complex queries, meaning they can get customers back to work faster as well as giving them far better job satisfaction. Nobody wants to spend their days clicking on 'unlock account' buttons and listening to customers explain why they have forgotten their password for the fifth time this year.

Why do organizations—of all sizes—continue to use manual processes on their help desks?

The answer you will often get is that these tools are expensive, and they cannot justify the investment. Unfortunately for them, that is not a valid argument. The outlay required to automate basic tasks has a rapid return on investment (ROI).

Every day that your help desk depends on manual workflows, you risk losing:

- **User satisfaction, confidence, trust**

- **Time** that could be spent on direct assistance, not admin drudgery
- **Energy** that could be directed toward learning and skills improvement
- **Issues and projects** that fall through the cracks
- **Knowledge and fixes** that are not shared with the team
- **Market reputation**

Ultimately, all these inefficiencies cost your company money and your well-earned reputation.

Prioritize automation

If you want to improve the value your help desk offers to the business, then automation needs to be at the top of your 'to do' list. Why? It will allow you to:

- Use your team's skills more effectively
- Get a grip on heavy or spiking workloads
- Accelerate issue resolution to please users
- Look like a help desk hero to management

Automation can help your team stay lean while handling larger volumes of tickets with ease. In other words, automation helps you work smarter, not harder.

Benefits of help desk automation to build your case

There are many benefits from employing automation on your help desk. These five benefits, however, stand out for their clarity in convincing top leadership that you need to prioritize automation on the help desk—ASAP.

1. Faster response times

Help desk teams are judged by how quickly they respond to and resolve issues. Being able to quickly resolve issues will greatly improve customer satisfaction.

Workflow automation and orchestration can significantly improve incident response times and problem resolution by incorporating predetermined if, then capabilities. In other words, if you receive a request like this, then do this specific task. For instance, if the help desk receives a call about a printer problem, workflow automation can:

- Determine the type of call.
- Route it to the right person.
- Send an automated response to the user.

Most automation systems also provide some way of allowing users to submit their own tickets via a web portal or email, thus reducing calls to the help desk while speeding up routing—a two for one benefit.

2. More accurate reporting

Automating workflows improves the accuracy of help desk statistics by avoiding human errors and inconsistencies in data entry. It also relieves managers of the manual work required to collect data and correct errors. Field defaults, required fields, and auto-routing rules are all tools to ensure every incident reported is handled properly and in precisely the same way.

Understanding how your help desk is currently performing will give you the information you need to plan improvements.

3. Improved user communication

One thing that annoys customers, perhaps more than anything else, is a lack of communication. When help desk analysts are busy trying to resolve incidents or fulfill service requests, it is easy to neglect customer communication.

Automating standard customer communications will mean that you can keep customers informed with little or no effort required from support staff. Automating call notifications, SLA escalations, and call resolution emails will:

- Ensure that your customers understand what is happening with their calls
- Help to manage their expectations

4. Skyrocketing productivity

When you can resolve incidents faster and fulfill requests more efficiently, users get back to work faster. This increases productivity and ultimately improves the bottom line for the business.

5. Increased staff satisfaction

Automation of mundane, repeated tasks frees up help desk team members to concentrate on more challenging work. This will increase their job satisfaction and motivation, reducing the cost of higher turnover.

Choosing help desk automation solutions

Help desk software solutions offer powerful help desk automation functionality based on customizable business rules. When it comes to automation in help desk software, make sure you're getting these capabilities:

- Automatically capturing and logging all incoming requests
- Automatically assigning each issue to a specific help desk technician (or group of technicians) based on skill routing
- Automatically notifying the technician that a new task has been assigned
- Automatically prioritizing issues according to rules (i.e. severity, system, person reporting)
- Automatically applying due dates and routing based on configurable service level agreements (SLAs)
- Providing tools to document successful fixes for issues so they can be leveraged later
- Creating and automating workflows to deal with processes such as user onboarding
- Documenting communication with the user

- Automatically notifying users of issue resolution or escalation
- Automatically surveying users after their issue is resolved to gauge satisfaction levels
- Generating reports based on issue-related and service-related metrics and automatically sending these to stakeholders

Additional automation will allow you to process simple requests without any human intervention, such as:

- Password resets
- Folder creation
- Permissions

Service desk automation software

The purpose of service desk automation software is to optimize across the three primary aspects of helping customers:

- To provide consistently high-quality help that satisfies customers.
- To provide that help in a streamlined way that makes the best use of resources and scales with the business.
- To achieve these aims in the most efficient way, in terms of cost, manpower, and time.

Companies benefit from IT service desk automation in a multitude of ways:

- Reduced customer wait time, for faster help
- Improved productivity of service desk personnel, relieving them of menial, repetitive work so they can focus on tasks with higher values
- Reduced errors and improved consistency, with reliable compliance with regulations and standards
- Increased service availability to customers, for help when they need it, not just during office hours
- Personalized responses based on past customer interactions
- The ability to scale up and down with the needs of the business
- Captured metrics for insights that can improve performance, track trends, and uncover patterns, surfacing issues and areas where service can be elevated
- Lowered overall costs
- Better service to customers, to improve satisfaction

The impact on your business can be considerable. With enhanced efficiency and lower costs, you can reallocate resources to fuel growth, innovation, and profit. When you resolve customer issues speedily and with less effort on their part, you create a better experience and enhance your brand. When you have detailed information about types of issues, volume of issues, resolution times, and customer satisfaction, you can better manage customer service, product development, and overall operations. It all adds up to a competitive advantage.

For the most complete features and cutting-edge technology in service desk automation software, consider BMC Helix ITSM. We support you through onboarding and migrating systems. You will be able to integrate with over 650 partners, and can always rely on our support hub for ongoing help to ensure you get the most from your system.

No question on automation

If you can automate, you should automate your help desk. Initial investment for technology solutions to facilitate automation will quickly be returned by way of improved efficiencies, reduction in errors, increased business productivity, and higher levels of customer satisfaction.

Additional resources

For more on this topic, explore these resources:

- BMC Service Management Blog
- Service Desk Automation: Are You Missing Opportunities?
- 7 Ways to Put Automation Everywhere Into Practice for the Enterprise
- What are Service Orchestration and Automation Platforms (SOAPs)?
- 5 Metrics & KPIs All Service Desks Need
- SLA Best Practices for ITIL, Help Desk & Service Desk