Help Desk Automation: Top Benefits of Automating Process

This blog is the second in a series on best practices for transforming help desk operations at small to medium-size businesses from reactive to proactive.

Many help desk teams at small to medium-size businesses (SMBs) still rely on manual processes for prioritizing and assigning tickets, often leading to delays in handling requests, incomplete documentation, lost requests, and poor communication to end users about the status of their issues.

Plus, with all this firefighting going on, forget about conducting follow-up surveys to measure end-user satisfaction. Surveys are the last thing on anyone’s to-do list in this situation, and the results of any survey under these conditions are unlikely to be good.
So, why do SMBs hang on to inefficient manual processes? Teams may lack budget for software tools, or simply be so busy that they haven’t even had time to evaluate better ways of handling help desk tasks.

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

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

Ultimately, all these inefficiencies cost your company money.

**Automation delivers major ROI**

If you want a big bang for your buck when optimizing help desk operations, automation should be at the top of your best practices 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, and 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.

**Targeted tasks for automation**

Software solutions for SMBs may offer powerful help desk automation functionality based on customizable business rules. Be sure that the software solution you choose can:

- Automatically capture all incoming requests and log them in a database
- Automatically assign each issue to a specific help desk
technician or group of technicians based on skill routing
- Automatically notify the technician that a new task has been assigned
- Automatically prioritize issues according to rules (i.e. severity, system, person reporting)
- Automatically apply due dates and routing based on configurable service level agreements (SLAs)
- Provide tools to document successful fixes for issues so they can be leveraged later
- Document communication with the user
- Automatically notify users of issue resolution or escalation
- Automatically survey users following issue resolution to gauge satisfaction levels
- Generate reports based on issue-related and service-related metrics

Top benefits of automation

1. Accelerating issue response

Most help desk teams are judged by how quickly they respond to and resolve issues. After all, speed is what users are looking for, and when they are happy, management takes note.

How does automation shorten response times?

Workflow automation 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 and route it to the right person and/or send an automated response to the user. Most 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
2. **Increasing reporting accuracy**

Automating workflow improves the accuracy of help desk statistics by avoiding human errors and inconsistencies in data entry. It also relieves managers of 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. They increase accuracy of data for reporting purposes, while improving service at the same time.

3. **Strengthening communication with users**

A pet peeve of users is silence regarding the status of their issues. Help desk teams can be overwhelmed by trying to send emails to each user when a request is received, escalated, or closed out. Automatic email notification takes that burden off your staff’s shoulders, and ensures that every user receives timely communications about status. This is a great way to increase satisfaction levels for your users while simultaneously reducing your staff’s workload.

4. **Building collective knowledge**

Knowledge bases make it easier for technicians to document fixes they have tried – both successful and unsuccessful – so their colleagues can learn from their experience and avoid wasting time and effort on reinventing the wheel. When a solution has been found to be helpful, the help desk technician can generate a knowledge base article from the resolution in the help desk ticket. The knowledge base should be searchable by both technicians and users, but it should provide a way to hide more-complex solutions from users so they don’t attempt to perform complicated fixes on their own.

The knowledge base helps the team provide consistent answers to users, while making it fast and simple to respond to
frequently asked questions. The result? Your team saves time and improves speed and accuracy, helping to drive down costs.

**Automation celebration**

You’ll breathe a huge sigh of relief after automating time-consuming, error-prone help desk tasks. Your technicians will have more time to focus on complex issues, help users, and add new knowledge and skills. Users will benefit from faster resolution, better communications, and the opportunity to provide feedback about services. In other words, automation will transform your help desk from reactive firefighters to proactive problem solvers, and that’s a great reason to break out the balloons.

Track-It! Help Desk Software from BMC offers robust automation capabilities to help streamline help desk operations. It supports best practices and addresses your top pain points— at an affordable price. Find out more at [http://www.trackit.com/](http://www.trackit.com/).