

IMSI news & views

P R O J E C T P L A N N E R S & M A N A G E R S

Selected Articles Edition 4

Nine Tips for Managing a Successful Help Desk

IMSI's Lynne Hendrickson developed and maintained the help desk for a major company. Her help desk has been effective in helping users resolve issues related to processes, software, and data. When *news & views* challenged Lynne to reveal her help desk secrets, she offered the following tips:

1. **Resolve calls quickly**

Answer questions and address problems immediately, route them to the right person or determine if further research is necessary, and begin work. Record all calls and close the loop on each to make sure no call goes unanswered.

2. **Listen, then ask questions**

Quick resolution requires a clear understanding of the problem. Some users may or may not be able to describe the problem accurately. Listen carefully to the user's description of the problem and if it is not clear enough ask clarifying questions (where did it occur? what were you doing? when?). Use the application to follow along and keep asking questions until you identify the problem so that the process of problem resolution can begin.

3. **Create a close working relationship with the developers**

The help desk and the developers must cooperate to allow quick and accurate communication of the issues. The help desk needs to know the status of each open issue to provide accurate information to the users. The developers need to know the current problems and concerns to prioritize and begin working on solutions. By creating a close working relationship, the software will have higher

quality and the users will get accurate information from the help desk.

4. **Track issues through resolution**

Have a process for documenting, discussing, implementing and releasing software with bug fixes and enhancements. Provide developers with a detailed description of each bug or requested enhancement. Include screen prints of bugs and samples of screen and report changes. Create a



database to track the status of current bugs and requested enhancements and discuss with developers frequently. After implementation and testing release periodic upgrades to the user community.

5. **Keep users informed**

Form a user group and have regular meetings to discuss desired enhancements and current problems. Provide a list of known problems and estimated completion dates so users know what to expect in future releases. When there is a serious problem do not wait for users to contact the help desk, have an alert system to inform them when a problem has been identified.

6. **Do not make promises you can't keep**

Do not promise that a bug fix or requested enhancement will be incorporated in the next release unless you are absolutely sure. Issues are constantly being re-prioritized and may not be ready for release. Users will end up disappointed and will lose their trust in the help desk.

7. **Balance time on and off the phone**

Providing technical support over the phone requires both concentration and patience. Having to concentrate and stay focused for too long can lead to diminished attention and patience. A successful help desk requires time off the phone to rejuvenate the mind. This

time is not wasted as it allows time to prioritize, research and document problems. Allow users to leave messages (phone and e-mail) so that you may prioritize which calls need immediate attention and those that can wait.

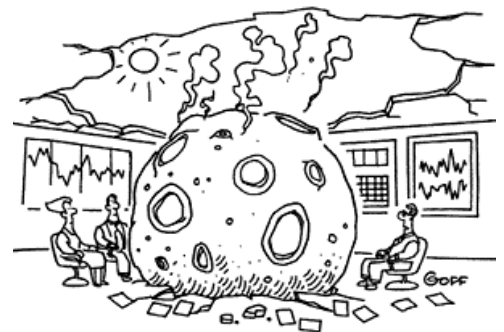
8. **Create documentation with the user in mind**

Create a user's guide to cover complete functionality and job aids for frequently asked questions so that users can answer some of their own questions. The documentation must meet the needs of users of all levels; do not make it too complex nor too brief. When creating the user's guide, limit the paragraphs describing the features and focus on step by step lists of how to use each feature. When creating a job aid, keep the document to one page and limit each step listed to one line for easy reading.

9. **Do not take it personally when things go wrong**

The help desk is in the position of hearing negative feedback about the software. The software may have a bug or is not providing the desired functionality. In addition to a software problem a caller may be having a bad day and is taking out their frustrations on the help desk. Do not take it personally, listen carefully and sympathize with their situation.

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"Is there anything else we failed to anticipate in our plan?"

Project Management: Art, Science or Bull?

Some executives characterize project management as a modern-day art form, a loose construct of ideas and principles which are masterfully applied to overcome obstacles and to complete the job. The underlying premise is that projects are complex beyond predictability – and that intuitive genius is the essential element needed for success.

Others take a decidedly scientific view, as if all factors could be predicted and every necessary alternative charted in advance. Project management is cut and dried. Check the status. Review the plan. Move forward.

Still others see project management as pure bull. Lengthy reports and fancy charts for management. Rally-round-the-flag meetings with the project team.

The fact is, no matter what view prevails, even badly managed projects somehow reach completion. Not always on time. Not always on budget. Not always up to the standard of excellence that management desires. They limp to the finish line – and the spectators wonder what happened.

Sometimes, surprisingly, there is no clear agreement on the project's purpose. Accomplishments are clouded by problems, misunderstandings and miscommunications which occurred throughout the process.

There are projects, for example, in which management is regularly assured that things are running on schedule while, in reality, delay after delay is occurring. Or, though there are signs to the contrary, management prefers to believe that all the targets will be met.

The worst scenario may be the most common: Management is keenly aware that the project is off course, but can't act decisively. There is no clear picture as to why the project is floundering, who's responsible, or what should be done to get the project back on track.

In all of these cases, disciplined project management has a role. It functions as the focal point for effective coordination, communication and control – ensuring that the right steps are taken at the right time, with full understanding of the implications.

When project management controls are used effectively, senior management knows and understands what is happening and why. There is a plan against which to judge progress, a framework within which to question assumptions, and a method to verify the answers received.

Senior management – using project management as a tool – is not diverted by fuzzy art, complex science, or bull. A project bar chart or resource histogram is as familiar as an inventory report. A project's cashflow projection is as commonplace as a balance sheet. Both project manager and senior manager are

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able to proceed with confidence...

Planning a project demands a “real-world” sensitivity to how long it takes to complete certain activities, particularly creative or intellectual activities, no matter what level of resource is applied.

How many project plans in your company are developed as if the design phases were as predictable as the rate of widgets coming off the assembly line?

Unfortunately, scheduling miscalculations as the front-end of a project are often treated with relatively little concern based on a fallacy that project managers call the “get well” syndrome.

The theory is that lost time can always be made up with the proper – perhaps massive – reallocation of resources. In some cases that's valid. If a project involved loading five trucks with ten men in two regular workdays, it's

reasonable to think that twenty men could do it in a single 8-hour day. Does that mean that 160 men could do it in a hour? Obviously not. But sometimes “get well” plans for late projects are based on the theory that you can infinitely multiply people and time to achieve needed results. There are situations where more resources help. Sometimes they do not. Sometimes they cause more harm than good.

Fredrick P. Brooks, project leader for the development of the IBM 360 operating system, points out that in many situations, the “man-month” is a myth. If a software development project is running late, adding resources actually lengthens the duration of the project – because of training, supervision and communication problems. It's the equivalent, says Brooks, of using gasoline to put out a fire.

Senior management, because it is in the position to do so, can have an important, positive impact on resource thinking in a project.

Through its involvement, senior management can help make sure that sound resource planning takes place before the project is launched – and can insist that catch-up scenarios be developed with a clear-eyed understanding of what's possible, and what isn't. In dealing with a behind-schedule project, the best action to take may be nothing more than changing the schedule of downscaling the project.

The worst action may be to insist that the time lost be made-up. It's easy to be lulled into the belief that certain activities can be rushed without a decrease in quality. On paper, the quality remains. In reality somebody lowered the standards.

From Making it Happen, A Senior Executive's Guide to Project Management, Primavera Systems, Inc.

