

Lessons Learned From Help Desk Consolidations



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Purpose Of Shared Services

Approach



- Economies of scale.
- One corporation—easier to do business with!
- Global creativity and innovation *and*
- Knowledge sharing for competitive edge.

Resulting I/T Organization



- Business-driven customer focused
 - Huge cultural shift =>retraining!
- Service level agreements
- Documents of understanding
- Solution Center & Functional Teams
- Service Analysts

What is “business-driven customer focused”?

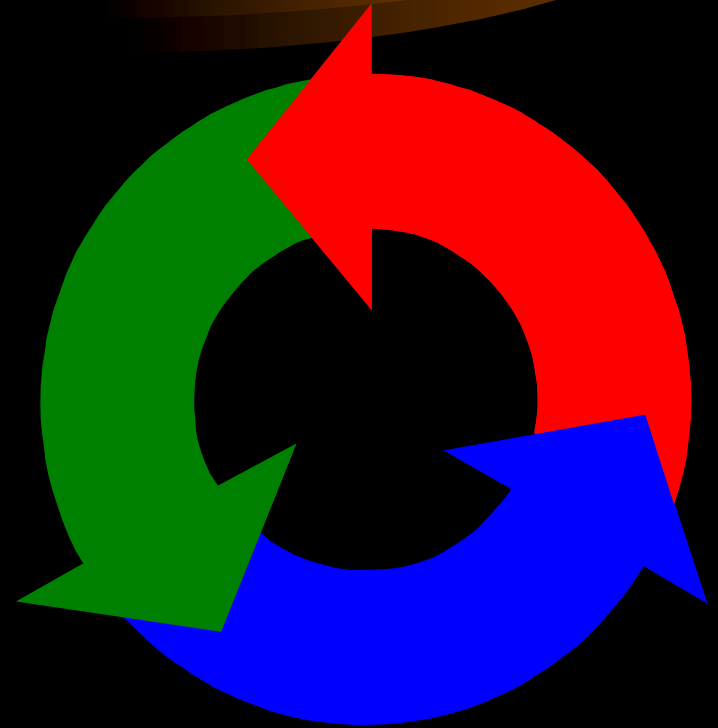
- Focus on overall business impact *not* the loudest customer.
- Solution Center (HUB) *not* Help Desk.
- SLA's based on defined bus. priorities.
- Beyond baseline requirements, customers give input to tech. decisions.

I/T Shared Services Organizational Design.

- Minimal hierarchy—empowered teams.
- I/T Process Leader and *working* team leader.
- Solution Center is HUB of problem solving and case management.
- Solution Center and other teams are equal.
- Service Analysts manage the customer relationship.

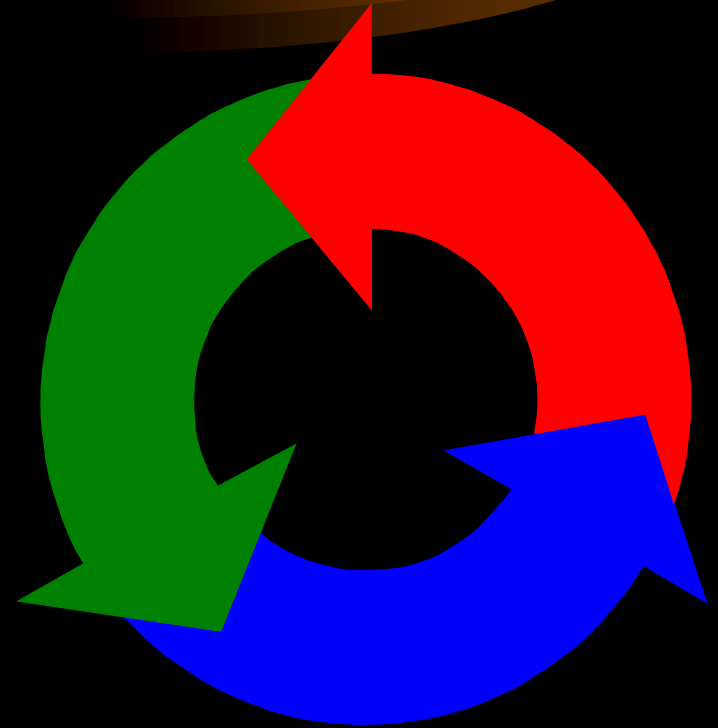
Old Ideas Die Hard & Sink You Again and Again!

- Head of I/T *Redesign* did not believe that human relations and change issues would be key.
- Consultants warned hard but he could not and did not believe.



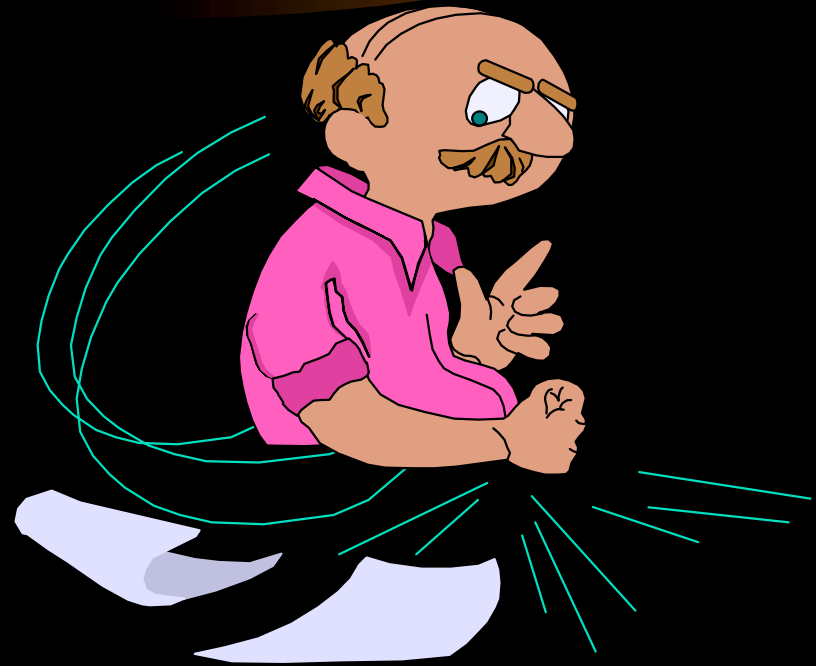
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- Thus chose a personnel selection instrument mostly on “cya” criterion.
- Many chosen were unwilling to make the shift to empowered team. Turnover!



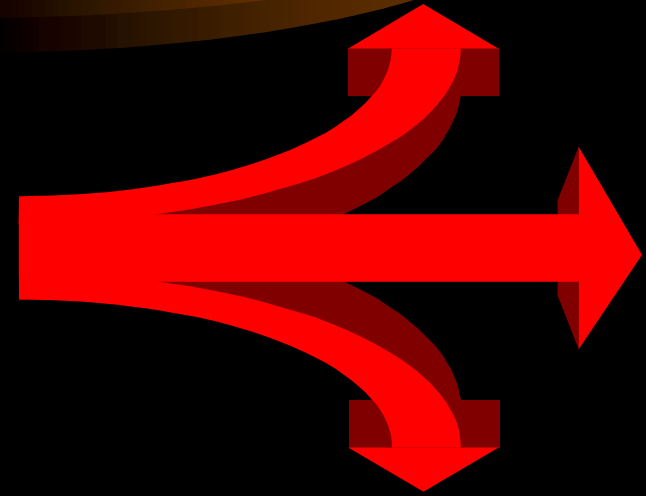
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- Politics! For team leader selection this was the primary focus.
- Existing I/T directors “losing power” chose new team leaders!
Very poor choices.



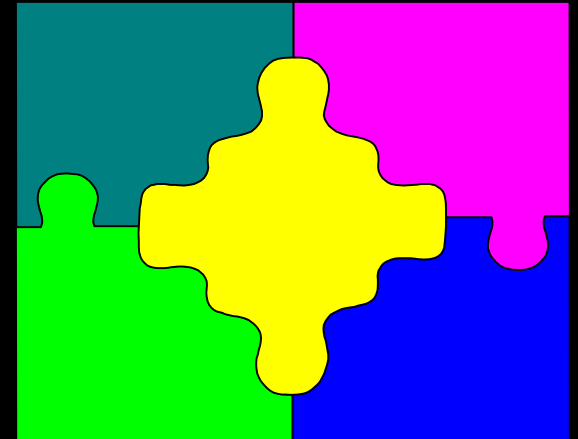
Human Change Model: Key Points To Remember.

- Change required must be clearly articulated, strongly championed, and coached for those willing to change.
- Human change concepts must be integral to the entire initiative.



Best Team Model: Purpose Driven-Empowered Teams

- Effectively act and react to changing bus. needs.
- Knowledge about business and I/T.
- All teams equal.
- Guidelines a must!
- Empowerment training a must.



Key Leadership Issues In Leading This Major Shift

- Lead on vision.
- Empower on management.
- I/T Shared Services Chief must “get it” and be able to lead it.
- Get “naysayers” out of org. if mistakenly selected.



Key Human Resource Issues



- I/T staff must have more than tech. skills.
- Team and comm. skills play a much larger role.
- Team leaders must be different personality types. Must be high on courage/risk scale.

Key Human Resource Issues



- Selection process must be relatively free of politics that reinforce “old way”.
- Use active interviewing techniques like scenarios, multiple interviewers, and also informal settings to get additional information.
- Watch and assess how well prospects listen and how they define team and customer service.

Critical Success Factors in Consolidating



- Re-engineer I/T concurrent with re-engineering of other business processes.
- Address human change issues and skill sets *before* consolidating to Shared Services and then on ...
- Prior to team member selection, hold programs to help existing div. I/T staff deal with change.

Critical Success Factors in Consolidating



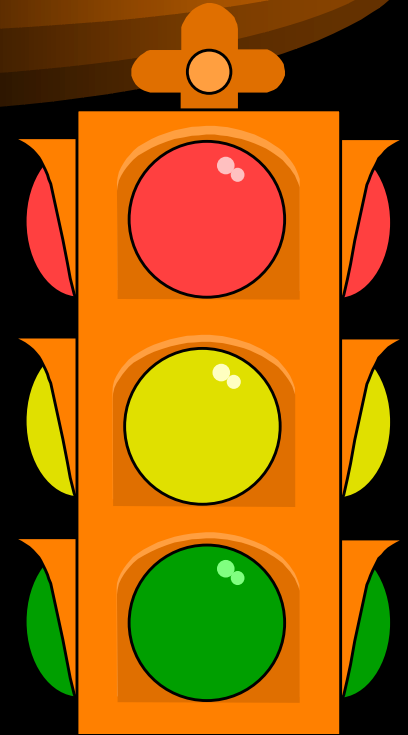
- On-boarding training program to teach the new purpose and processes within 1st week.
- Provide training workshops in new organization on customer service, teamwork, purpose/process. Use role plays.
- Market change and educate customers.

*Land Mines To Avoid Or **Blowup***

- **Nay-saying** – Lead on vision.
- Indifference – Motivate by example.
- Apathy – Change takes time. Must keep yourself pumped up.
- **Traces of I/T Disconnect From Customers** – Replace with process.
- **Rumors** – Communicate throughout.

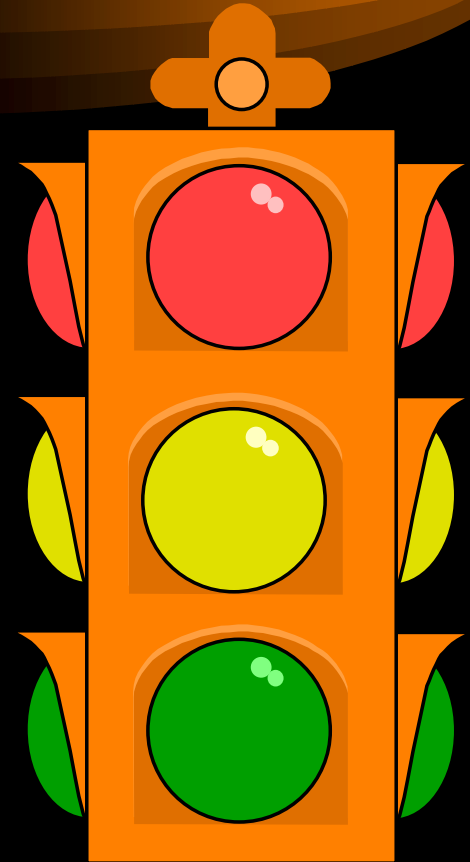
“The Don’ts” Of I/T Shared Services Shift

- Don’t use a *help desk* design.
- (Do Use Solution Center HUB).
- Don’t assume I/T staff *cannot* learn team, communication, and customer relationship skills.
- (Teach those that are willing.)



“The Don’ts” Of I/T Shared Services Shift

- Don’t enable resistance to change and bad behavior.
- Teach and coach those *willing* to change.
- Get rid of those that are not.



“The Do’s” of Shifting To Shared Services

- Run *human change cycle* workshops for all affected.
- **Move ahead toward vision despite resistance.**
- Address customer service and teamwork formally. Corp. culture has been opposite.



Great Books & Resources To Achieve Successful Change



The 2000 Percent Solution. Authors: Mitchell, Coles, Metz. Amacom Press.

The Courage to Change. Author: Stephen Covey. Simon & Schuster.

Transitions. Author: William Bridges. Perseus Books.

www.katenasser.com - consulting and workshops.