

From Vision to Execution:

Service Desk Strategy Guide



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Introduction

As a consultant and auditor, one of the biggest challenges I find a service desk faces is creating a robust and meaningful strategy. I think the word “**strategy**” itself creates a mistaken sense of complexity and difficulty that really isn’t the case. All we are looking for is something to show you know your objectives and how you are going to achieve them, we are not looking for a Brexit level trade agreement document!

Remember no-one ever said a strategy must be a dull 25 page plus word document, some of the best I have seen are graphically driven, send a clear message and have been present via PowerPoint, a web page or other engaging medium.



The fundamentals for a successful service desk strategy

Let's start with the fundamentals for a successful service desk strategy, it's simple really and has 3 steps:

- 1** An awareness of the organisational goals and objective
- 2** An IT strategy which underpins these goals and objectives
- 3** A service desk strategy which aligns with the IT strategy

With this approach, you should be able to show how every objective you have for your service desk underpins your organisation's goals, either directly or indirectly, and that is the key to success.

Simple, yes? That's the key; a good strategy simply shows how a service desk will be successful today, tomorrow and in the future.

Now let's look at the benefits of a good service desk strategy:

- It sets a purpose and direction for your team.
- That purpose and direction moves away from a "break fix" mentality.
- It shows all stakeholders that the service desk understands how critical it is to their success, has a plan to achieve its goals and enable the IT strategy.
- It helps service desk staff understand key decisions that are being made.
- It shows a clear path to strategic achievement and identifies the roles and responsibilities along that path.



What should go into a great service desk strategy?

Each strategy has to absorb its own characteristics that meet the type of service desk and provider you are, your culture and even your maturity. However, for me, I like any service desk strategy to answer the following questions:

- Who we are and who do we support?
- How are we structured? (operating model)
- What services do we provide?
- What processes do we own or interact with?
- A strengths, weaknesses, opportunities and threats (SWOT) analysis
- What is the service desk vision and mission? How are these supported by critical success factors (CSFs) and how are these CSFs validated by related key performance indicators (KPIs)?
- What are the values the service desk work to uphold?
- What is the high level (organisational) strategy?
- What is the IT service provider strategy and how is this supporting the high level one?
- What are the service desk strategic objectives and how are these aligned with those of the IT service provider?
- What is the execution plan for each of the service desk's strategic objectives?
- How will the service desk strategy be reviewed, tracked and measured?
- What is the plan for stakeholder engagement?
- What are the risks the service desk are facing that could impact strategic success and how are these being mitigated?
- What assumptions are being made regarding the strategic journey?
- What are the service desk's current challenges and proposed solutions?

What makes a poor strategy?

In my experience a poor strategy has the following attributes:

- 1 It stands in isolation and does not link to or provide business objectives.
- 2 It only shows an end state (the objective) and not how to get there.
- 3 It is not treated like a "living" document but created and filed.
- 4 It's not communicated to or understood by the service desk team, (the people you need to achieve success!)
- 5 Key stakeholders are not identified and involved in the creation or iteration of the strategy.
- 6 Risks are not identified or understood.
- 7 It's not published.
- 8 Measurements of success are not defined.
- 9 It's assumed strategic alignment is set, these need to be reviewed regularly with stakeholders to ensure everyone is still moving in the same direction. *

**A scenario I often use is that if you set a strategy in 2019 and did not review it in 2020 following the impact of Covid, it is unlikely to still be fit for purpose.*

Some of the recurring questions I get asked about setting a service desk strategy are:

What if there are no organisations objectives or an IT strategy?

While the situation may not be perfect, it's crucial not to let this hinder your grasp of the business's direction and its goals. Developing strategic objectives for the service desk can initiate a positive feedback loop, inspiring the broader service provider to establish its strategy. This could be viewed as an opportunity for the service desk to demonstrate its value and lead by example.

What's the difference between Operational, Tactical and Strategic?

There's no "empirical" values to set to this but for me, its:

- Operational is today and this month
- Tactical is this quarter and next quarter
- Strategic is this year and next

What is the period of time I should set my service desk strategy for?

Ideally you service desk strategy should align with the timelines of the organisation one. However, if this has not been set, I like to set a strategy for 12 to 18 months; beyond that it can be hard to identify where you need to be, and a strategy should not be down to guess work or overly aspirational.

Can you help us?

Yes! We love strategy! It's probably why one of my favourite roles I had ever had was "Client Strategy Director" for an ITSM tool vendor. We would love to work with you on building out **comprehensive and effective strategy** for your service desk.

If you want to know more **book a meeting** with me!



Service Desk Strategy Implementation

Lastly, I mentioned how maturity can influence (and in fact enhance) a service desk strategy. So, I've listed below a suggested path with suggested timelines to help ascertain where you are and help you build a path to success:



Key things to evaluate and assess

Current service desk performance metrics

Consider systems thinking and design thinking principles (you could even include these in your strategy document!). You need data on how your service desk is currently performing. This includes metrics such as response time, resolution time, first contact resolution rate, incident and request volume and backlog, customer satisfaction scores, and staff workload.

Details about the currently used technology

Details about the current technology used by the service desk, such as ITSM tools, chatbots, self-service portals, and any other software solutions. Assess their functionality, efficiency, and user-friendliness.

Understanding of your current service desk processes

A clear understanding of your current service desk processes. This includes workflows for handling different types of requests and issues, escalation processes, and any defined service level agreements (SLAs).

Skills, expertise, and training levels of your service desk staff

Information about the skills, expertise, and training levels of your service desk staff. This could include technical skills, communication skills, and understanding of your organisation and its products/services.

Gathering feedback

Feedback from customers, staff, and other stakeholders is crucial. This might include feedback on customer service quality, common complaints, areas for improvement, and suggestions.



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Understanding of your current service desk budget

Understanding of your current service desk budget, as well as any budget constraints or flexibility you may have for improvements.

Knowledge of the industry's current standards

Knowledge of the industry's current standards and best practices can help benchmark your service desk and identify areas for improvement. This could include SDI's global best practice standard for service desk, ITIL® guidelines, ISO standards, etc.

Aligning service desk with organisational strategy

Your service desk strategy should align with your overall organisational strategy and objectives. Understand these objectives and consider them when developing your plan.

Information about your competitors

Information about how competitor or comparable organisations manage their service desks can provide valuable insights. Your service desk strategy should align with your overall organisational strategy and objectives. Understand these objectives and consider them when developing your plan.

Information about your customer's behaviour

Information about your customer's behaviour and expectations can help tailor your service desk to better meet their needs. This could include preferred communication channels, peak contact times, common issues, and general service expectations.

A list of potential risks facing your service desk

A comprehensive list of potential risks facing your service desk, which could range from technical failures and security breaches to staff turnover and budget cuts. Also potentially risk impact assessment, risk probability assessment risk mitigation strategies and risk monitoring plan.

Disaster recovery and business continuity plan

Disaster recovery and business continuity plan to ensure that services can continue in the event of a major incident or disaster. It should include backup processes and disaster recovery procedures.

A continual improvement process

A continual improvement process is vital for governance and a good continual improvement register ensures buy in and alignment to strategic objectives, it shows people that they have a voice, they are empowered and how their ideas and work are contributing to success.



Don't be scared by strategy, believe it or not, building one is a fun and rewarding experience. It's easier than you think and will set you on the right path and keep you there! Make sure your strategy is underpinned every day by a comprehensive service desk operations plan.


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