

THE DEFINITIVE GUIDE TO RUNNING A SUPERIOR HELP DESK

How Leading MSPs Deliver
Efficient, Effective Support
Without the Chaos

STANDARDIZE.
SECURE. SCALE.



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CONTENT SECTIONS

- Building Your Team
- Training Your People
- Streamlining for Efficiency
- Taking It to the Next Level
- Building Trust
- Serving Your Customers
- Reporting and Metrics

Your Help Desk: The Face of Your MSP

As a Managed Services Provider (MSP), you're tasked with keeping your customers' technology and data on the secure, correct path. In theory, when you do your job well, your work is pretty much invisible to your customers. They don't see all the work put in behind the scenes to keep them up and running. When your customers *do* interact with you, it's often in regard to a problem you need to solve, and quickly.

That's why your help desk needs to be top-notch—they're often the only interaction your MSP will have with a customer, outside of quarterly business reviews, thus becoming the de facto face of your company.

Your customers expect professionalism, proficiency, courtesy and fast, thorough solutions from your help desk. Failing to deliver on these expectations will most likely result in customer dissatisfaction leading to higher costs, lower profits and increased churn for your MSP.

In this definitive guide, Liongard's Director of Partner Success Kendrics Hawkins and CEO Joe Alapat will take you inside the help desks of successful Managed Services Providers to learn how to elevate your support game. You'll learn:

- What an all-star help desk team looks like
- How to standardize and streamline your operations to provide better customer service
- The power of automation in providing proactive, Level 4 support
- Best practices for solidifying customer relationships and building trust
- What help desk performance metrics to track and measure for continued improvement and growth



KENDRICS HAWKINS



JOE ALAPAT



→ BUILDING YOUR TEAM

To Build a Great Help Desk, Start with Great People



On the surface, MSPs are in the business of IT management and security. But the core of an MSP's offerings is customer service. You can have the best team of experts in every department, but if they can't communicate well, stay poised and positive under pressure or deliver satisfying resolutions, your customers will be heading for the door.

For this reason, an MSP's help desk hires are critical. To build a service-centric support team, look for engineers who:

- Have great people skills, listening skills, a positive attitude and a smile in their voice
- Truly enjoy working the help desk, or understand its importance in advancing them on their career path
- Have a team-player mentality (no lone wolf personalities for this position)
- Are responsive and take a proactive approach to support, instead of sitting around and waiting for instructions or an escalation
- Actively seek help when needed
- Are satisfied only when their customers are satisfied



Technical skills are vital, too, of course. But those can usually be enhanced and fine-tuned to the MSP's needs fairly quickly; the skills mentioned above are not nearly as easily improved upon.

Hire great people first, and you'll have a solid foundation on which to build your help desk.

"While there's a whole lot that advanced technology and automation can do to make work easier, there's always going to be a need for people with strong communication skills, enthusiasm and a positive attitude."

Joe Alapat, Liongard CEO



→ TRAINING YOUR PEOPLE

Cultivate the Necessary Mindset



Like most other positions, your help desk team will require some training to understand their role within your MSP, the technology you utilize, your workflow processes and how they should meet challenges that arise. Current members of your support crew will also benefit from ongoing training, so emphasize the importance of continued learning and provide opportunities accordingly.




A culture of accountability will go a long way in building a strong help desk. Rather than a method to scrutinize employees, make accountability a positive by tying it to your compensation and bonus structure. Rewarding superior service should be a no-brainer for any MSP aiming to retain both customers and employees.

ONLY 37% OF COMPANIES PROVIDE THEIR SERVICE DESK EMPLOYEES WITH PERFORMANCE-BASED RAISES.

Source: SDI Service Desk Benchmarking Report

THE TRAINING TRIFECTA

When it comes to *what* to train for, focus on the three most important aspects of the help desk: listening, empathizing and communicating.

LISTENING	SHOWING EMPATHY	COMMUNICATING
		
<ul style="list-style-type: none">✓ Actively listen as the customer describes the problem in full.✓ Catch details the first time around to avoid asking repetitive questions.	<ul style="list-style-type: none">✓ Realize the importance of the issue to your customer.✓ Diffuse the situation and set emotional customers at ease with your words and actions.	<ul style="list-style-type: none">✓ Make customers feel like their problem is your top priority.✓ Turn a negatively charged situation around.



→ STREAMLINING FOR EFFICIENCY

Standardize Your Workflow and Tools



There's nothing fun about having to dig around looking for information while a customer sits simmering. Ensuring your data and documentation are complete, accurate and standardized across all customers, processes and tools is the best way to set your help desk staff up for success and minimize situations like these.

With the right tools, you can document all procedures and workflows and help your staff deliver a consistent, high standard of customer care. Every MSP has to find the mix of tools that work for their team, while at the same time avoiding "tool sprawl" that ends up complicating your engineers' lives and slowing processes down.

"If you're not best-in-class in automation, you're not best-in-class service desk. Period. End of story. When you're automating, you're more efficient, you're more accurate and you're more profitable."

Will Young, CCS Technology Group, LLC

The most important part of your toolset? An integration platform that automates as much as possible, thus maximizing your technicians' productivity. You never want your team to be doing manually what can be done faster and more accurately by automation.

ARE YOU AUTOMATING EVERYTHING YOU CAN?

Liongard helps MSPs standardize, streamline and scale with advanced automation across your:

- PSA
- RMM
- Documentation

100% ADOPTION REQUIRED

Once you've chosen the right tools for your MSP, ask yourself: How do I get my team to use them and not go around them? If the tools you researched so thoroughly and spent money on aren't being used, standardization is impossible. It's human nature to resist change, so everyone must see the benefits of adoption.

Find ways to incentivize the use of new and existing tools among your team. Holding contests that require their use or scavenger hunts within the systems will familiarize everyone with the benefits and help garner buy-in.



→ TAKING IT TO THE NEXT LEVEL

Make Automation Your Level 4 Support

With automation working for your MSP around the clock, you've got Level 4 support built right into your customer support solution. It's the continuous discovery, the automated documentation, the change detection, the actionable alerts and the reporting—the tasks that free up time across the board and make troubleshooting easier—that take you to the next level.

LEVEL 4 SUPPORT WITH LIONGARD IS:

- Always on
- Extremely accurate
- Constantly improving

"The actionable alerts are the bread and butter of Liongard. It's a great tool and has paid for itself a thousand times over!"

Glenn Porter, President,
5th Gear Technology Concepts



Employ continuous discovery and automated documentation that integrates with your PSA configurations for always up-to-date information. No more stale data sending you down rabbit holes. Liongard's automated documentation helps ES Consulting's engineers be more efficient, with the equivalent of approximately \$75K in time savings. [FULL CASE STUDY >](#)



Automate change detection so your engineers can quickly "rewind history" to pinpoint problems and enhance security. Go back in time to see what happened, and when. Doberman Technologies used the historical timeline in Liongard to identify a third-party vendor's critical changes, saving a \$13K per month relationship. [FULL CASE STUDY >](#)



Set actionable alerts to monitor best practices and security standards, with full-loop ticket integration. 5th Gear Technology Concepts uses Liongard's custom alerts to simplify HIPAA audits and cut onboarding time by 50%. [FULL CASE STUDY >](#)



Check for issues across all customers efficiently with cross-customer reporting on the cloud, network, apps and servers. A proactive approach to identify issues early across customers helps standardize your data. top.media runs reports in Liongard across all of its customers to help avoid problems and to address concerns en masse. [FULL CASE STUDY >](#)



→ BUILDING TRUST

Develop Lasting Rapport and Loyalty



Superior MSP help desks solve problems efficiently but also go the extra mile to make their customers feel like a top priority. With a new customer, your help desk should aim to deliver that first “Wow!” moment early on. Whether it’s through proactive communication, effective listening, expressing empathy, or conducting a thorough follow-up, a “Wow!” moment sets a positive tone for the entire customer relationship.

That’s not to say it will always be smooth sailing. Nobody is perfect. With the constantly evolving nature of technology and managed services, help desks are here to stay. That’s why it’s important to do your part, have your team ready in advance and keep the goals of the help desk in focus always. Your team can approach each problem with a customer-first mindset. Every interaction is another opportunity to earn the customer’s trust and make them say, “Wow!”

5-STEP ACCOUNTABILITY PATH

For your help desk team to deliver outstanding customer support, ERGOS Technology Partners VP Aaron Huff recommends following these five steps:



→ SERVING YOUR CUSTOMERS

Emphasize the Art of Communication



Professional, two-way communication (both verbal and written) will help your service desk set your MSP apart from the pack.

TO MASTER THE ART OF COMMUNICATION:

- Encourage feedback, even if it's negative, to help your team grow and measure satisfaction
- Insist on timely communication with customers from your team
- Stay calm under pressure
 - Respect the urgency of the customer's situation
 - Speak with empathy and consideration to emotional customers
 - If you're annoyed or defensive, take a minute to cool down before hitting "reply"
- Say 'no' the right way—tone and delivery make all the difference
- Set expectations from the start about the situation
 - Give details, if applicable, about the issue and your plan to resolve it
 - "Under-promise and over-deliver" to help prevent customer dissatisfaction
- Document communications for the whole team

38% OF CUSTOMERS SAY THEY FEEL MORE VALUED IF CUSTOMER SUPPORT AGENTS ARE AWARE OF THEIR PREVIOUS INTERACTIONS.

Source: Gladly 2018 Customer Service Expectations Survey

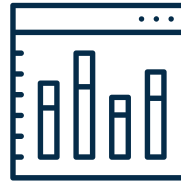
"Anyone can support the environment. It's always about the communication. Your best, most technically skilled technician is useless if the client doesn't like him."

Kevin Blake
CEO, ICS



→ REPORTING AND METRICS

Measure Performance for Continuous Improvement



Measuring key performance indicators (KPIs) of your help desk is essential if you want to continue impressing your customers.

Not all MSPs measure all of these KPIs, but the best MSPs measure at least a few of the following so they can refine, evolve and scale:

- Average Response Time (Time to First Contact)
- Tickets Open vs. Tickets Closed
- Outstanding Issues
- Ticket Age
- **First Call Resolution**
- Minutes of Support per User, per Month
- Customer Satisfaction (CSAT)
- Net Promoter Score
- Service Department Profitability
- Service Utilization
- SLA Compliance

FIRST CALL RESOLUTION IS ALMOST ALWAYS ASSOCIATED WITH HIGHER CUSTOMER SATISFACTION.

THE LIONGARD DIFFERENCE

62.5%

IMPROVEMENT IN AVERAGE TIME TO TICKET RESOLUTION

Actionable alerts generate tickets in your PSA and self-close when resolved.

As reported by TeamLogic IT – Memphis using Liongard

\$75K

SAVED PER YEAR

Eliminate the cost of manual effort. Free up your help desk and engineers to be more proactive, scale your MSP and improve customer satisfaction.

As reported by ES Consulting using Liongard

50%

REDUCTION IN TIME TO ONBOARD

Save time onboarding a new customer or assessing a prospect, minimizing time lost digging for answers to random requests.

As reported by 5th Gear Technology Concepts using Liongard



→ CONTRIBUTORS

THANK YOU!

We hope you enjoyed this Help Desk Guide. We wish to thank all those that contributed to its creation. For automated documentation, actionable alerts and reporting and metrics to drive your MSP business forward, look no further than Liongard.

→ **Kendrics Hawkins, Director of Partner Success, Liongard**

With 15+ years as an engineer, Kendrics knows what it takes to make IT work to one's advantage. As Director of Partner Success at Liongard, Kendrics makes sure our partners get the most value out of our platform. From onboarding and training to support and retention, he's focused on helping MSPs use Liongard's capabilities to start operating at 10X.

→ **Joe Alapat, CEO, Liongard**

With 20+ years of experience in small business, mid-market, enterprise IT, software and security, Joe's unique perspective and understanding of the IT landscape led him to co-found Liongard with Vincent Tran in 2015. With a goal of driving insight from automation in the managed services industry, Joe has led Liongard to new heights while helping MSPs around the world standardize, streamline and scale.

