10 ways to get your help desk ready to support a new rollout

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Successfully rolling out a new application or system does not end when the “switch” is flipped on for all users. More often than not, the help desk must still cope with the users’ need for support as the project rollout finishes. These tips will help your staff ramp up to deliver the necessary level of support with the least amount of chaos.

1 Get involved (way) early

The help desk (and its support needs) always seem to be the last item on the checklist for most projects. This means the expertise of the help desk staff isn't being used as the project unfolds. Most project managers, support analysts, and vendors concentrate on the high-level issues. Then, typically, near the end of the project, they tend to provide limited support information to the help desk, almost as an afterthought.

To counter this tendency, the help desk must have sufficient involvement early enough in the project to get ready to address the questions and needs the users will have as the project gets rolled out to them. One of the best ways to ensure this involvement is to use a form to gather pertinent information that can be shared among support staff. This "Program rollout preparation checklist" is an excellent tool for nailing down the details that the help desk will need on a project, such as program, login, and printing requirements; affected users; security information; support options; and documentation.

2 Train the users… then train the help desk

As projects are rolled out, user manuals are created and instructor-led or CBT classes are used to train end users, but what about the help desk support team? Consider sending some or all team members to the end users’ training. If full training isn't feasible or necessary, you can create a condensed version. Even some familiarity with the processes will help your staff understand and resolve the problems users encounter.

3 Get screen shots of install and setup

Nothing is worse than having to walk users through a procedure or task without the benefit of seeing the menus or options. Have a small set of team members install the application and make notes of potential issues and document them. Remember: The support team will be asked setup questions, so they need to be familiar with this process. If the help desk is supporting multiple versions of an application, get a step-by-step screen shot of each version.

4 Prepare to support remote users as well as internal users

Document unique or special support needs that differ between internal use and external remote use of an application/device. Not only will the support be different, but more often than not, the support team can't simply remote in and “take care of the issue."

5 Create an installation package

Use a software installation package tool to create a consolidated package. This will save time, reduce inconsistencies, and take the guesswork out of the application installation process.

6 Assemble support documentation (with pictures)

Callers to the help desk are likely to need assistance with every aspect of the application. Put together documentation that includes instructions and images of login screens, install menus, special application screens, and setup screens.

7 Implement hotlines for immediate issues

Depending on the size of the rollout and its impact on the organization, you may want to create a temporary hotline for users. This makes it easy for them to contact support staff who are trained to deal with immediate issues. You might also create a backdoor number that the support staff can use to quickly contact a senior support analyst for information or clarification during the first few days of a rollout.

8 Identify subject matter experts/senior end users

Train one or more senior support staff members to serve as specialists for the application. You may also want to tap some of your more experienced end users to help other team members as needed. In fact, you might have a senior end user available at the help desk during the first few days of a major rollout. The advantage is that urgent how-to's are answered right away and the senior end user gets a feel for what is going right and what is going wrong.

9 Create triage

It's very important to the initial rollout and the ongoing support process that sound triage be developed by meeting with the vendor, support analyst, and members of the help desk. Make sure you've addressed these questions:

- What kind of issues can be expected?
- What common or known error messages will the help desk get calls about?

10 Prepare to address how-to concerns

When a new application or device is rolled out, the help desk team is faced with fielding the everyday "how to" questions they get from end users. Although the team cannot be a subject matter expert in all aspects of the support model, they can assist with the most common five or 10 issues.

One good way to deal with ongoing support needs is to create a "top issues" cheat sheet for help desk staffers. This will allow even the less experienced help desk staff to identify and resolve a high percentage of problems.

Additional resources

- TechRepublic's Downloads RSS Feed XML
- Sign up for TechRepublic's Downloads Weekly Update newsletter
- Sign up for our Desktops NetNote
- Check out all of TechRepublic's free newsletters
- "Avoid support headaches with this program rollout checklist" (TechRepublic download)
- "Prioritize help desk requests with this call-level chart" (TechRepublic download)
- "Twelve qualities of successful support techs" (TechRepublic download)

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