

The Internal Customer:

Applying a Customer-Centric Philosophy
to Your Help Desk and Service Desk



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Introduction

With nearly 60 percent of CIOs identifying customers as their top priority in 2017,¹ companies are beginning to reevaluate the way they incorporate a customer-centric philosophy. Along with this renewed focus on the customer experience, many businesses are also turning their attention to their employees' experiences. These employees—also known as internal customers—rely on services from other teams within the organization for support, and one of the most widespread internal services is the IT Service Desk.

When a customer-centric philosophy is applied to the IT Service Desk, businesses benefit from increased internal customer satisfaction and more efficient business processes. Strategically, the Service Desk can gather profiles for internal customers and optimize support procedures accordingly. From a tactical perspective, the Help Desk can foster positive experiences through direct interactions with employees.

Applying a customer-centric mentality to the IT Service Desk poses several challenges, particularly related to corporate culture and training. This eBook outlines best practices that can help business transition smoothly from a traditional model to a customer-centric approach.

¹ <http://www.gartner.com/newsroom/id/3287617>

What Does It Mean to Be Customer Centric?

Within the last year, customers have become the second highest priority for CEOs in an increasingly digital economy.² And, in a recent survey of 1200 IT leaders across 23 industry segments, 57 percent of CIOs reported customers to be their top priority moving into 2017. This marks a sharp increase from 2015, when only 45 percent of CIOs prioritized customers in favor of business performance.³

As more companies begin to narrow their focus on their customers, many are applying a customer-centric philosophy to the way they provide support for their products and services both internally and externally. But why is being customer centric so important?

When a business is customer centric, the customer is the central driving force behind each of the company’s decisions. Every interaction with the customer is designed to create a positive customer experience (CX), beginning the moment a potential customer becomes aware of the business and extending throughout the duration of their relationship, even after a product is sold or a service is provided. Positive CX leads to repeat business, customer loyalty, and profit, which explains why so many businesses are beginning to shift their focus to the customer—especially when it comes to technology.

How Has Technology Transformed the Customer?

IT leaders are shifting their focus to the customer, but what is the connection between customers and technology? Put simply, technology has changed the way that customers make decisions in a couple of core ways:

² <http://www.gartner.com/newsroom/id/3287617>
³ <https://www2.deloitte.com/uk/en/pages/technology/articles/cio-survey.html>

- 1. **Customers are more informed about the products and services they consume.** Thanks to the internet, information is more accessible, which means potential customers are more educated about the products and services they buy. The ease of online communication also provides customers with a public forum for evaluating the companies they interact with, giving word of mouth a greater influence on business today than ever before.



- 2. **Customers have more access to the competition.** If CX doesn’t live up to the customer’s expectations, the competition is only a click away. The customer can find a similar product or service at a lower price with only a minimal amount of research. As a result, CX is becoming a key differentiator for businesses competing in a digital economy.

Of course, thinking about what the customer knows is only one half of the equation; to be truly mindful of CX, companies must also reimagine who the customer is.

Two Kinds of Customers

Until now, we've only been talking about one kind of customer: the **external customer**. External customers are the people outside the organization who pay for the company's products or services, and it's important to keep them satisfied so they continue to pay for those products and services, generate revenue, and expand the customer base through word-of-mouth referrals.

The second kind of customer—the **internal customer**—doesn't necessarily pay for products or services, and that's because internal customers are people inside the organization. These individuals rely on "services" from other team members within the organization to perform their job duties.⁴ For example, if a member of the sales team relies on the marketing department to create a slide deck, the sales person is an internal customer who depends on a "product" delivered by the marketing team.

External Customers

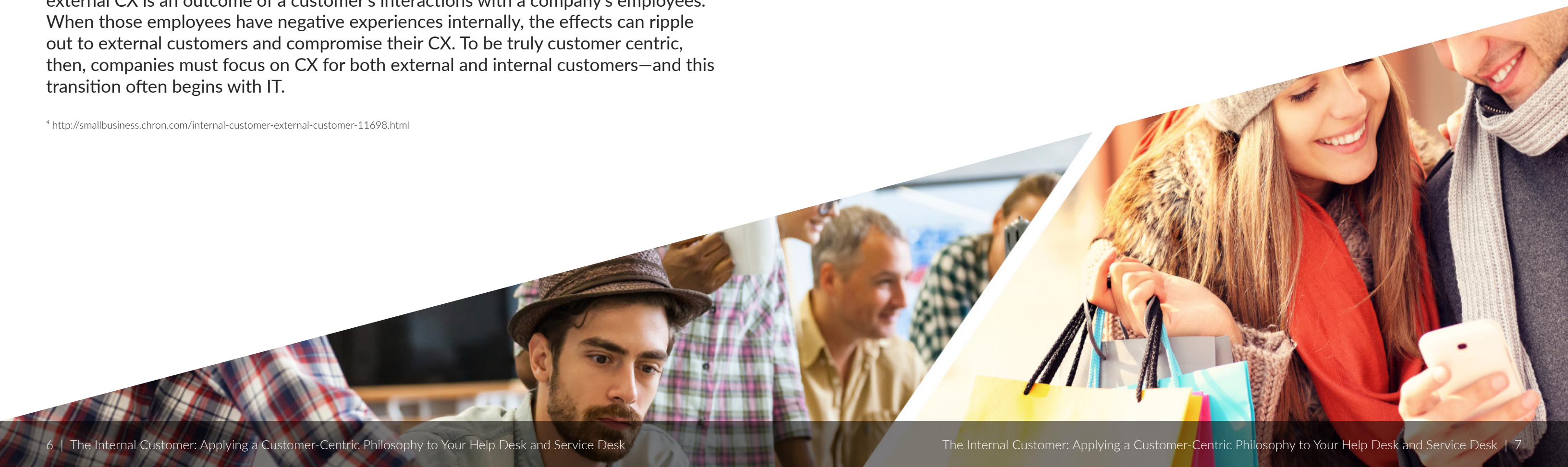
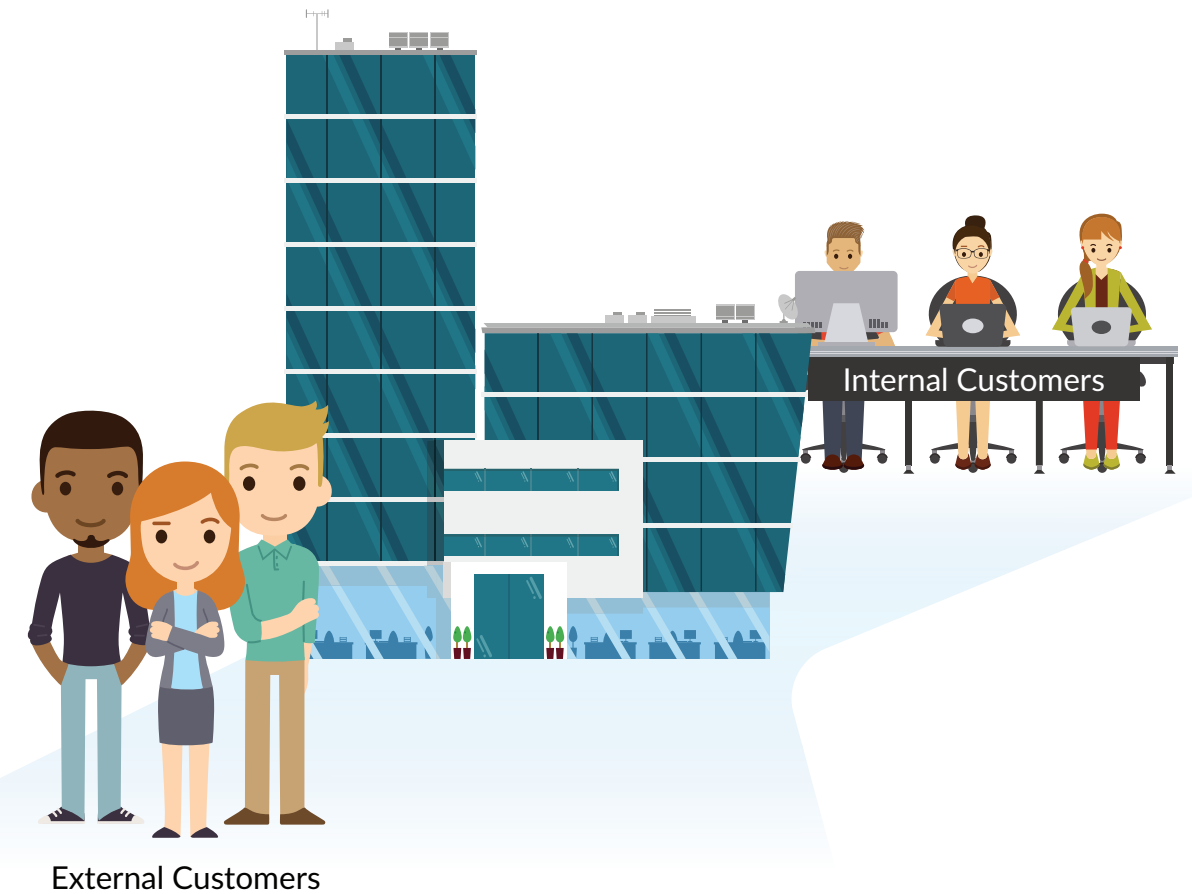
- Outside the organization
- Customer support
- Generate revenue

Internal Customers

- Inside the organization/employees
- Team-member support
- Generate business value

When companies talk about being customer centric, they are often referring to creating a positive CX for external customers only. However, it's important to remember that external CX is an outcome of a customer's interactions with a company's employees. When those employees have negative experiences internally, the effects can ripple out to external customers and compromise their CX. To be truly customer centric, then, companies must focus on CX for both external and internal customers—and this transition often begins with IT.

⁴ <http://smallbusiness.chron.com/internal-customer-external-customer-11698.html>



Why Does the Internal Customer Experience Matter?

Keeping employees happy is important, but it's only one outcome of internal customer service. And, while it may seem like internal customer service is designed to benefit individuals, it actually leads to organization-wide improvements. In fact, applying a customer-centric approach to internal services results in better communication, process enhancements, cross-functional alignment, and increased productivity.



Better Communication

To be customer centric, businesses must focus on communication. When support teams communicate effectively with the internal customers they serve, employees are more knowledgeable about organizational goals, and support teams are more aware of the issues and roadblocks that their customers encounter. This awareness allows support groups to make better informed decisions, which affects the entire company.



Process Enhancements

Open dialogue about internal processes creates awareness about inefficient workflows—and to improve the customer experience, the processes themselves must be improved. These improvements not only enhance individual employees' experiences, but also streamline workflows across the organization.



Cross-functional Alignment

Because process improvements often affect multiple members of the organization across several departments, service organizations make enhancements with the business' cross-functional goals in mind. As processes are rolled out, departments become more aware of how they contribute to large-scale goals, resulting in cross-functional alignment and increased collaboration.



Increased Productivity

Together, communication, process enhancements, and cross-functional alignment contribute to better productivity not only on an individual scale, but also between departments.

How Does a Customer-Centric Approach Apply to IT?

All employees rely on technology in some form or another to perform their job responsibilities, making IT one of the most widely used internal “services” at most companies. As a result, support organizations like the IT Service Desk often carry a great deal of responsibility when delivering internal customer service.

Within an IT organization, a **Service Desk** acts as a single point of contact for internal customers. Its function is to provide complete technological support and make strategic decisions about tools and processes that drive the overall goals of the business. This focus on high-level process improvement makes the Service Desk a key player in IT Service Management (ITSM) activities, including Incident Management, Problem Management, and Change Management—all of which have direct or indirect effects on internal customer experience.

Incident Management in particular provides direct support for end users, so many Service Desks contain a **Help Desk** component to track and resolve incidents and requests related to software applications and hardware endpoints. Help Desks provide personalized, often face-to-face assistance, so technicians must not only possess top-notch IT skills, but also be mindful of their interactions with end users.

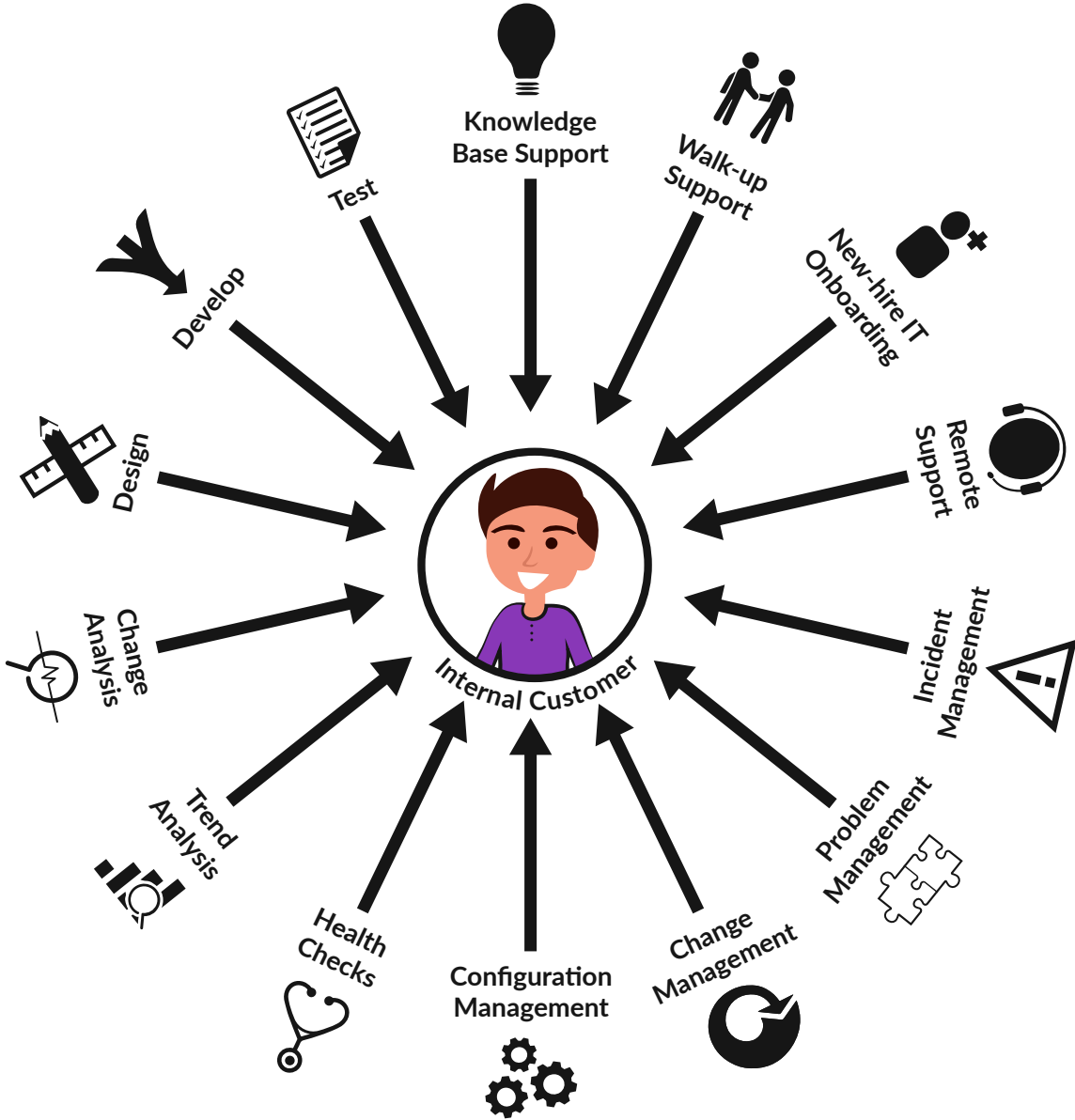
Help Desk

- Offers **tactical** support
- Solves **individual** issues
- Focuses on **Incident Management**
- Often exists **independently**

Service Desk

- Offers **strategic** support
- Solves **organizational** issues
- Focuses on **Service Management**
- Often includes a **Help Desk** component

A customer-centric Service Desk follows the same model as a customer-centric business, meaning that every action the Service Desk performs should be done in the attempt to improve the internal customer experience. This cultural shift has large-scale implications on the Service Desk as a whole, with a significant impact on the Help Desk.



Strategic – The Service Desk

For a Service Desk to be customer centric at a strategic level, the IT organization needs to prioritize the customer experience from the top down. Rather than focusing on technologies that are inexpensive or easy for the Service Desk to manage, they need to focus on technologies that are easy for the customers to use. Of course, balance is important, and there are several considerations that the Service Desk can make to ensure that both customers and IT have their needs met.

Get to Know Internal Customers

To learn about their internal customers, the Service Desk can develop employee profiles to determine day-to-day job requirements for specific groups of employees.⁵ Employee profiles function similarly to customer profiles, which collate demographic and behavioral characteristics to inform decisions about products and services.⁶ Employee profiles allow the Service Desk to understand its customers and their requirements, which helps them create IT initiatives that align the customer experience with the company's strategic objectives.

Build Solutions with Internal Customers

Once the Service Desk has developed an understanding of its internal customers' needs, they can continue to foster positive internal CX by developing and testing solutions alongside the employees who will use them day in and day out. By inviting representatives from key employee profiles into the development process, the Service Desk can not only build strong relationships with internal customers, but also gain valuable feedback into the practical effectiveness of their solutions before deploying them.

⁵ <http://americas.nttdata.com/blogs/digital-dialogue/2016/april/characteristics-of-customer-centric-it>

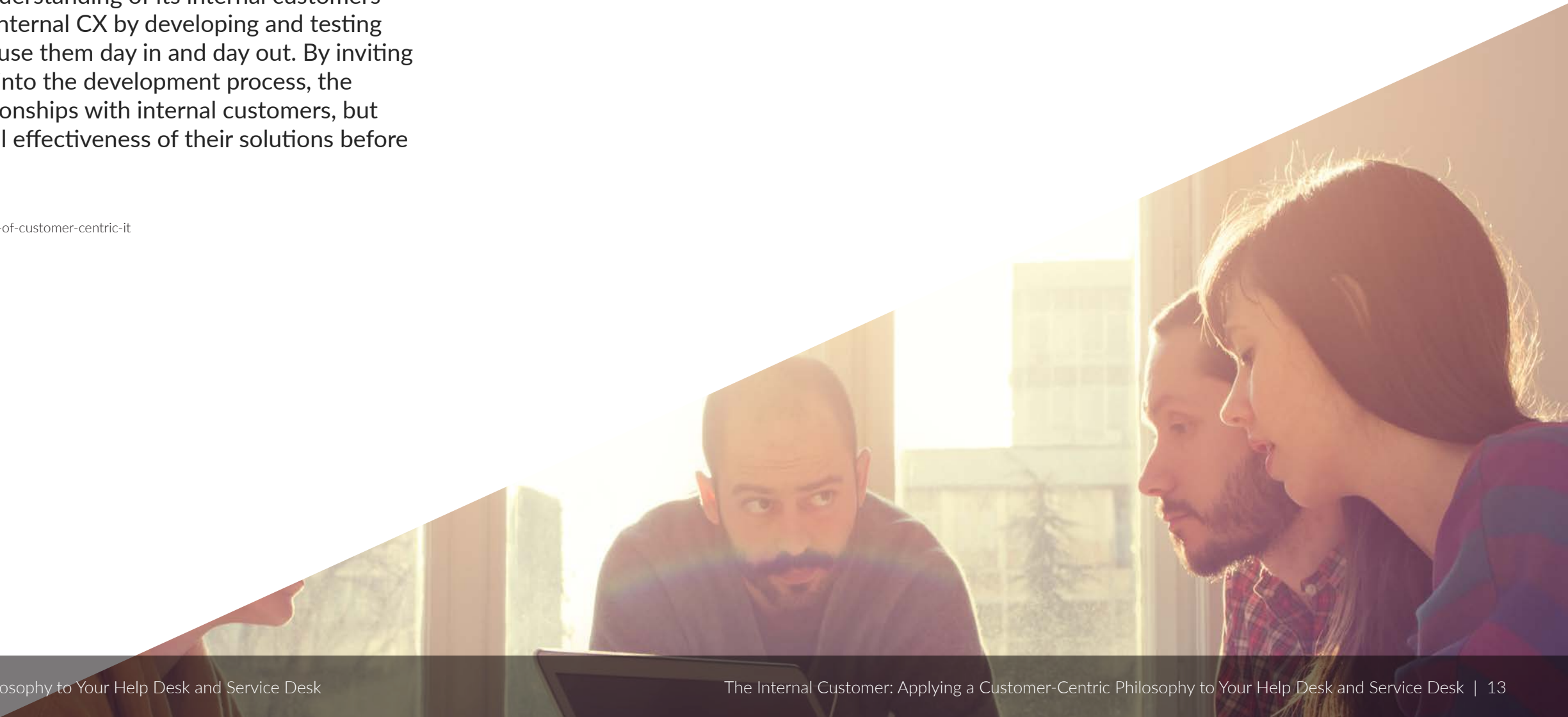
⁶ <http://www.businessdictionary.com/definition/customer-profile.html>

Anticipate Internal Customers' Needs

When it comes to delighting customers, proactivity is key. In the case of the Service Desk, being proactive means being able to anticipate what internal customers need before they need it—especially when it comes to cross-functional changes to existing processes and technology. For example, if the company decides to change their email client, the Service Desk can anticipate that users may have questions about composing messages, syncing calendars, or adding the new email client to their phones. By anticipating these needs, the Service Desk can proactively inform end users and provide self-help resolutions to mitigate the impacts of the change.

Communicate with the Customer

Communication plays a key role in the customer experience, especially in an IT Service Desk. By communicating effectively, the Service Desk informs end users about upcoming changes, solicits valuable input from internal customers, and raises awareness about the Service Desk. Communication channels between the Service Desk and internal customers must remain open in order for the Service Desk to make informed decisions and maintain a healthy presence in the company.



Tactical – The Help Desk

While much of what the Service Desk delivers takes place behind the scenes, Help Desk technicians have direct contact with end users on a daily basis, making them the “face of IT” for internal customers. As such, the Help Desk carries a great deal of weight when it comes to creating positive internal CX. To be more customer centric, the Help Desk should:

Build Relationships with Internal Customers

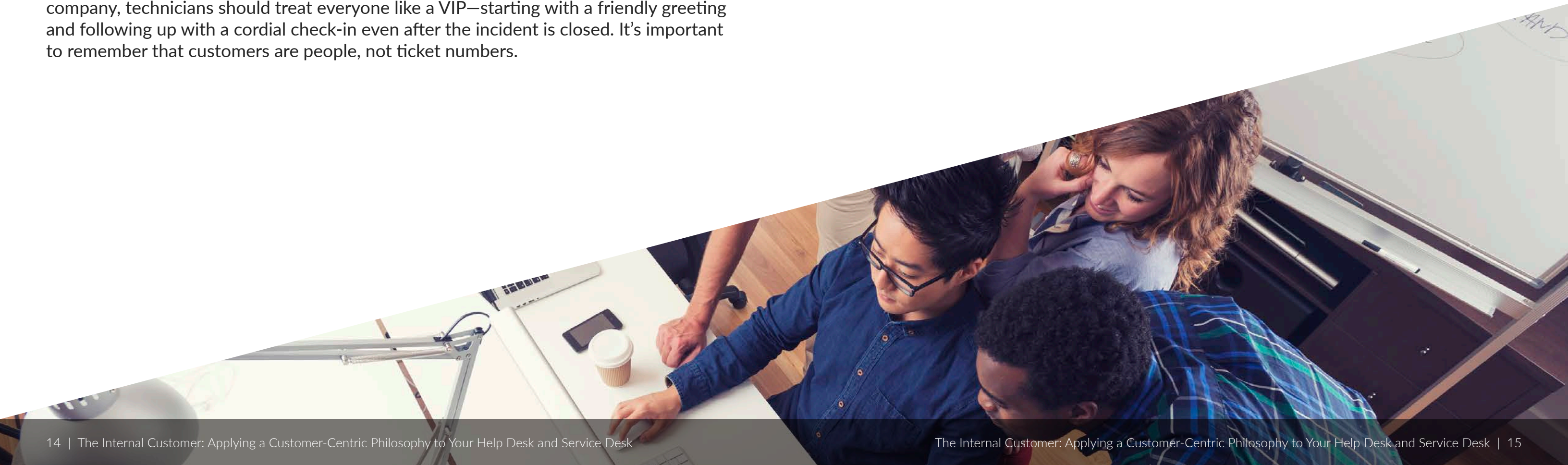
Think about the way a customer feels when a barista from her local coffee shop remembers her order. That experience illustrates the way in which even a casual relationship can enhance the customer experience. When the Help Desk embodies a similar level of personalization, internal customers feel more comfortable reaching out for support—and more satisfied by the support experience. Building relationships with internal customers leads to more honest feedback and a more positive CX overall, which leads to favorable word of mouth and improves the reputation of the service organization.

Treat Internal Customers with Respect

For Help Desk technicians, common issues like password resets may seem overly simplistic. Technicians need to remember that technology is not a core competency for most of their internal customers, and every customer should feel valued, no matter the complexity of their issue. Whether they’re helping a new hire or the COO of the company, technicians should treat everyone like a VIP—starting with a friendly greeting and following up with a cordial check-in even after the incident is closed. It’s important to remember that customers are people, not ticket numbers.

Be Flexible with Internal Customers

Help Desks can implement more options, such as desk-side, walk-up lounge, and remote. While each variation changes the way the customer interacts with the Help Desk, each should focus on the ease with which internal customers can request and receive help. Rather than creating strict request processes and turning end users away when they don’t follow them, implement more options for submitting requests. When it comes to CX, helping the customer is more important than following the process to a T; small concessions, such as opening a ticket on the customer’s behalf, go a long way toward customer satisfaction.



Provide a Seamless Experience

Help Desks strive to provide first-touch resolutions, but unfortunately some end users may be required to perform additional steps to resolve incidents. For example, if a user calls the Help Desk for support, she may discover that she actually needs to travel to the walk-up desk to pick up new hardware. If the Help Desk does not operate seamlessly, then the user will have to explain her issue all over again upon arrival, which is a frustrating waste of time. Under a seamless model, the user's phone call automatically becomes a ticket; that ticket is passed to the appropriate deployment technician, and the user arrives at the Help Desk to find her fresh hardware waiting for her. By paying attention to the customer's journey from the time they encounter an issue to the time it is resolved, the Help Desk can pinpoint a clunky process and make strategic improvements.

Consider How Issues Impact Internal Customers

Help Desk technicians respond to incidents and requests based on impact and urgency indicators. However, some tickets that seem low-priority to the Help Desk may seem critical or urgent to the employee experiencing the problem. Even if the Help Desk team cannot respond to an incident right away, it's important for technicians to have empathy for internal customers' issues. To maintain positive CX, technicians should avoid trivializing issues and let end users know that their requests will be handled as soon as possible.

Offer Solutions to Internal Customers

End users engage with the Help Desk and Service Desk because they want to focus on their jobs—not on IT issues. Most users expect to receive first-touch resolutions to their issues, but occasionally extenuating circumstances or unforeseen complications lead to longer resolution times. In cases where the Help Desk is unable to solve the customer's issue on the spot, it's important to offer an alternative solution or workaround to allow the person to return to work. Internal customers will value the effort that the Help Desk puts into resolving their issues.

Challenges of Customer-Centric Behavior

Each of the customer-centric Service Desk and Help Desk practices described in this eBook are designed to improve internal CX, and they are valuable for IT organizations who prioritize the customer in their service delivery. However, not all Service Desks are prepared to shift to a customer-centric approach.

Becoming customer centric can be a bit of a challenge, particularly in terms of the aspects below.

Changing Culture

IT leadership may decide to become customer centric, but this change signals a significant cultural shift for the Service Desk. The transition represents not only a change in processes, but also an adjustment in mentality that must be internalized through repetitive actions. As a part of this shift, IT may need to implement new best practices and deploy new applications.

Discomfort with Customer Service

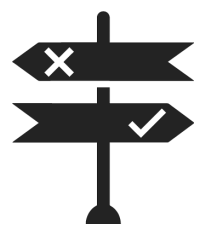
Most Service Desks are used to making decisions based on logic and data, and for many IT personnel, customer service is on the opposite end of the spectrum. In some cases, IT personnel are hired for their technological skills rather than their customer service experience, creating a skills gap for teams who decide to become customer centric. Additionally, customer service is difficult to quantify, making it tough for IT teams to address the perceived value of the shift.

Lack of Demand Standards

Many Service Desks have standards in place to ensure quality service. The Information Technology Infrastructure Library (ITIL) offers a particularly popular framework for ITSM and Service Desk operations. However, ITIL does not contain any specific guidelines or best practices related to customer service. This lack of standards creates confusion for Service Desks seeking a customer-centric methodology, and it makes it challenging to define and measure Service Level Agreements (SLAs) related to the quality of customer interactions.

Best Practices for a Customer-Centric Service Desk

Despite the lack of defined industry standards around customer-centric Service Desks, there are several best practices that can help the Service Desk deliver a consistently positive CX.



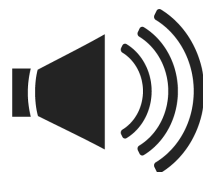
Define the ideal internal CX

CX is different for every business. In order to successfully produce positive CX, the Service Desk needs to define what a good—and a bad—customer experience looks like. Then, they need to share that CX with the rest of the organization and own it cross-functionally.



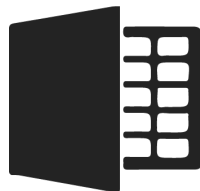
Create definitions and standards in IT

Service Desks can address the lack of defined industry standards for customer service by creating and implementing guidelines within their organizations. Doing so will allow customers to be more knowledgeable about the Service Desk’s services and feel more empowered with the technology they use. When end users know how the Service Desk works, they are less likely to ask questions that elicit “no” answers, which ultimately leads to a more positive customer experience.



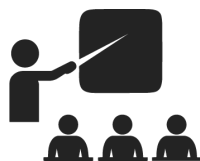
Listen to customer feedback

Service Desks can learn a lot from their customers about what services are and are not working. Positive feedback helps spread the value of the Service Desk throughout the organization, and negative feedback helps the Service Desk improve over time. When internal customers talk, the Service Desk needs to listen.



Take a data-driven approach

While the nuances of the customer experience can be difficult to quantify, there are a few concrete metrics and SLAs that the Service Desk can measure to take a data-driven approach to CX. For example, internal customers can complete surveys following Help Desk interactions to measure the effectiveness of the service, providing feedback about the process, quality, and value of their interactions.



Stress customer service in the hiring and training process

When hiring for the Service Desk, there is a tendency to focus primarily on candidates’ IT skills. However, Service Desk managers should stress customer service during interviews, throughout the hiring process, and in training exercises. In some cases, it’s easier for technicians to absorb new technical skills than it is for them to learn customer service.



Communicate positively as often as possible

In the Help Desk and Service Desk, saying “no” is part of the job. While it may seem paradoxical, learning to say “no” in a positive manner is critical to keeping CX high. Positive communication manifests in many forms, including word choice, tone, and body language. The Help Desk should always give internal customers the impression that technicians want to help, even if they are unable to.

Internal CX Ripples Outward

When the Service Desk and Help Desk adopt a customer-centric mentality toward internal customers, the effects eventually ripple outward to external customers. Because IT support organizations are responsible for developing initiatives and processes in alignment with the entire company’s business strategy, customer-centrism in the IT department enables customer-centrism for the company as a whole.



Shep Hyken ✓
@Hyken

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The internal customer experience determines the external customer experience.

Author and customer service expert Shep Hyken notes in a tweet that “The internal customer experience determines the external customer experience.”⁷ In other words, the way internal customers are treated has direct and indirect effects on the consumer. Even though the Service Desk rarely interfaces with external customers directly, internal customers rely on the Service Desk to implement, maintain, and support the tools that they use to communicate externally. As a result, when the internal customer experience is positive from a support perspective, employees can interact with external customers more effectively, producing a positive outcome for the business overall.

⁷ <https://twitter.com/hyken/status/487960137576251393?lang=en>

About Milestone

At Milestone, we’ve been transforming IT since 1997, when CEO Prem Chand founded Milestone Technologies, Inc. Then, Prem’s goal was to solve a growing problem for Silicon Valley businesses: IT relocation. Nearly two decades later, we are growing as quickly as the high-tech industry, with more than 1,700 employees serving a client base of over 200 companies in 18 countries. Today, Milestone’s goal is to shape the way technology is delivered. Every solution we provide is driven by experienced people who are determined to understand your business goals and align your IT to help you achieve them, ultimately streamlining your path to success.



Managed Services:
<http://www.milestonepowered.com/solutions/managed-services>

Contact Information
Phone: (877) 651-2454
Email: ITSolutions@milestonepowered.com

Corporate Headquarters
3101 Skyway Ct
Fremont, CA 94539
www.milestonepowered.com

