Ten Steps to Creating a SharePoint Support Model

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IDENTIFYING THE PROBLEM

"Good Customer service should be non-negotiable and service providers shouldn't hide behind self-service tools and technology when it comes to knowing their products and taking care of their customers"

"70% of support experiences are based on how the customer feels they are being treated"

"According to customers, customer service agents failed to resolve their issues 50% of the time"

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In this session we will solve the problem

- Practical techniques for creating first class SharePoint support environments

- Strategic and Measured approach for the creation of a support model

  - Ten key steps in building support built on
    - **What** needs to happen?
    - **Why** does it need to happen?
    - **Where** should it happen?

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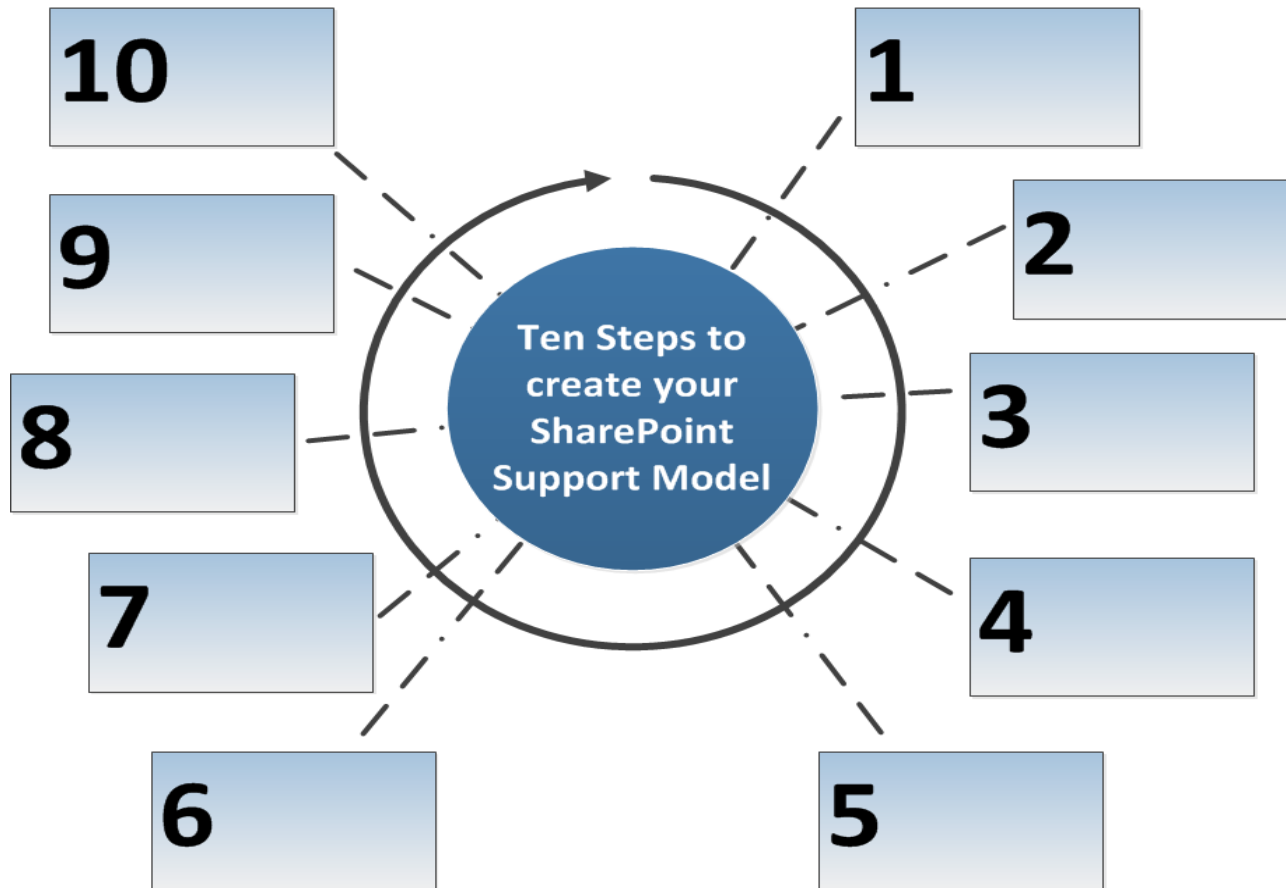
1 Examine Your Resources

- **Build an Inventory**
  - Map SharePoint
  - Map Integration Services
  - Infrastructure
  - Contacts

- **Identify Staff Capability**
  - Current Skills
  - Required Skills

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1 Examine Your Resources

- List what makes up the SharePoint Platform
- Review team skills and capabilities
- List Internal and External Contacts

1 Examine Your Resources	2 Identify Your Customers	3 Launch Your Services	4 Establish Workflow Management	5 Establish Query Closure Methods
	6 Establish Reporting	7 Control Your Work	8 Communicate with Your Customers	
		9 Survey Your Customers	10 Redo Steps 1 to 9 Regularly	

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A SharePoint Customer is **anybody** who **consumes** what they **perceive** you have produced...

What is a Customer?

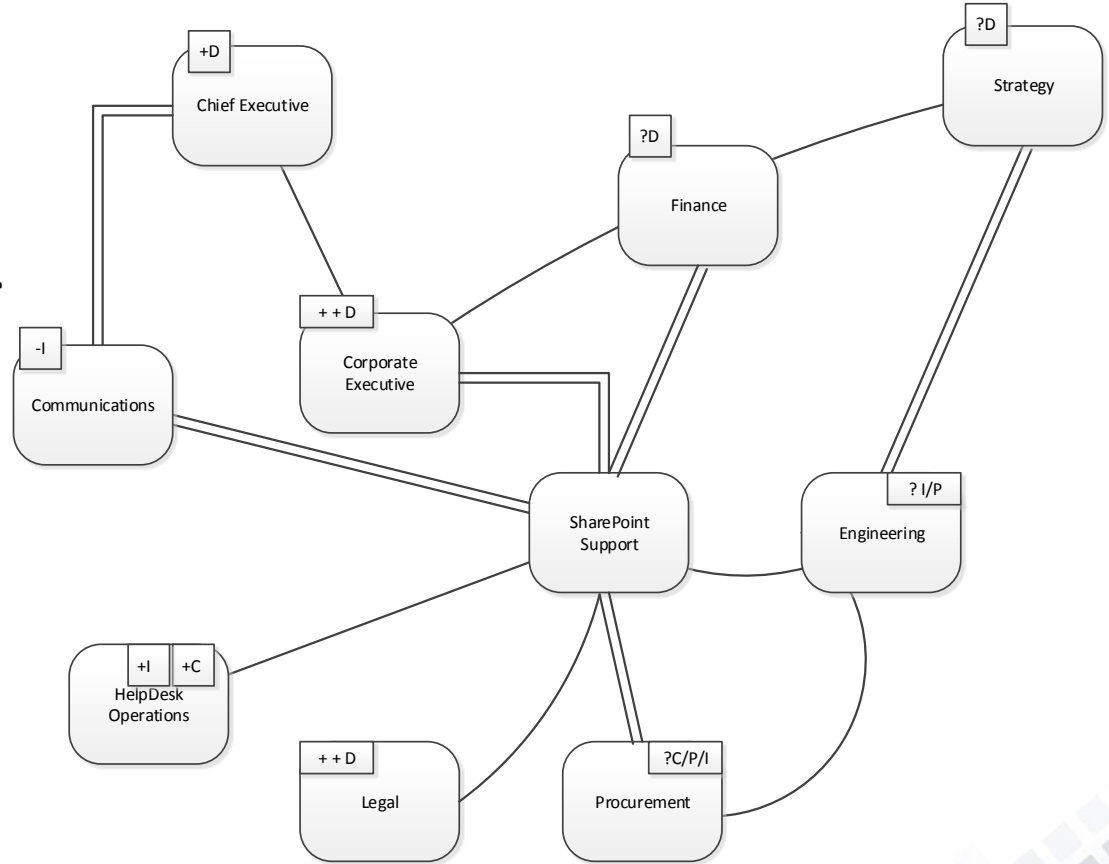Whether or not the customer's perception is correct...

Whether or not you had produced it...

Whether or not you had intended to produce it...

- Build the Customer Map
- Identify Customer Importance
- Language

Customer map diagram with the following nodes and attitude/role markers:

- Chief Executive — +D
- Strategy — ?D
- Finance — ?D
- Corporate Executive — + + D
- Communications — -I
- SharePoint Support
- Engineering — ? I/P
- HelpDesk Operations — +I +C
- Legal — + + D
- Procurement — ?C/P/I

Legend:

D = Decision maker
I = Influencer
C = Consent
P = Player (target for Training)

+ = Positive attitude
- = Negative attitude
O = neutral attitude
I = attitude unknown

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2 Identify Your Customers
- List your Customers and Non-Customers
- Define Customer Importance
- Confirm Language

1 Examine Your Resources	**2 Identify Your Customers**
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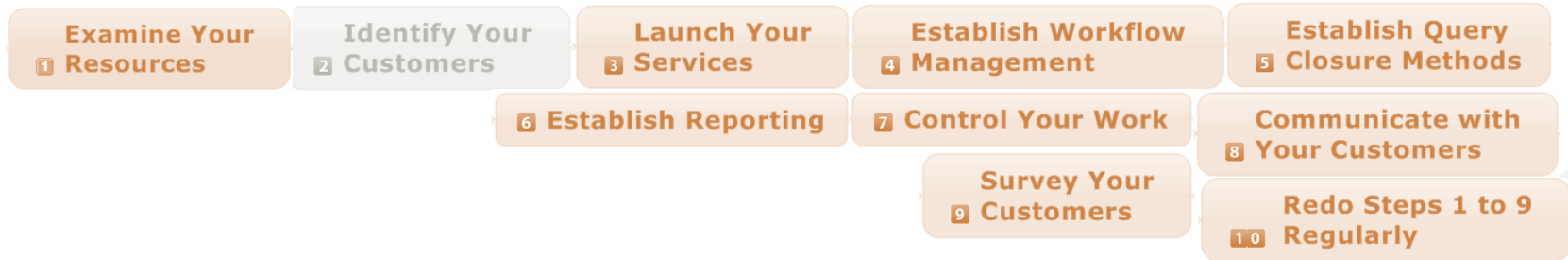
- Market SharePoint Support

- Establish Call Procedures

- Setup Training and Awareness Channels

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3 Launch Your Services

- Build your Statement of Operations
- For inappropriate Services create SLAs
- Be mindful of Support from the Outside
- Service excellence is measured in Client Terms, NOT yours

| 1 Examine Your Resources | 2 Identify Your Customers | 3 Launch Your Services | 4 Establish Workflow Management | 5 Establish Query Closure Methods |

| 6 Establish Reporting | 7 Control Your Work | 8 Communicate with Your Customers |

| 9 Survey Your Customers | 1 0 Redo Steps 1 to 9 Regularly |

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4 Manage the Flow

- Confirm where Ownership of request lies
- Chart the work and showcase it
- Ensure Customer Feedback

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4 Manage the Flow

- Enhance internal Helpdesk system
- Build a SharePoint Admin Centre
- Control the Demand
- Delegate and Escalate
- Map Policies to Support Needs

| 1 Examine Your Resources | 2 Identify Your Customers | 3 Launch Your Services | 4 Establish Workflow Management | 5 Establish Query Closure Methods |

6 Establish Reporting   7 Control Your Work   8 Communicate with Your Customers

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5 Establish Query Closure Methods

- 360 degree feedback
- Use UAT to confirm success
- Analyse Failures and Successes
- Be Proactive!

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5 Establish Query Closure Methods

- Ensure Customer Satisfaction
- Analyse Completed Jobs
- Analyse how the issues were resolved
- Review Closure Methods

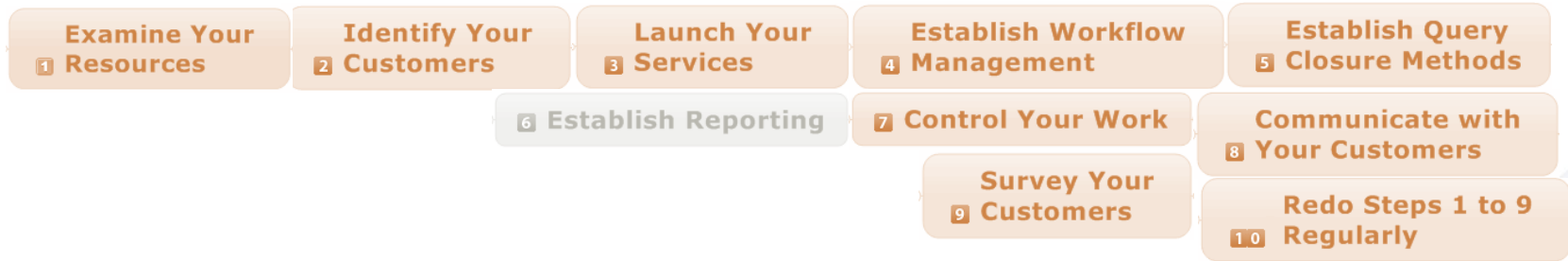|				
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6 Establish Reporting

- Justify ROI
  - Time taken to solve
  - Lost user productivity

- Record resolutions
  - How Do I
  - FAQs

- SharePoint Helpdesk 2013

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**6 Establish Reporting**
- Provide Snapshots of Workload
- Identify Resource Requirements
- Centralise Reports
- Establish Dashboards

1 Examine Your Resources	**2** Identify Your Customers	**3** Launch Your Services	**4** Establish Workflow Management	**5** Establish Query Closure Methods
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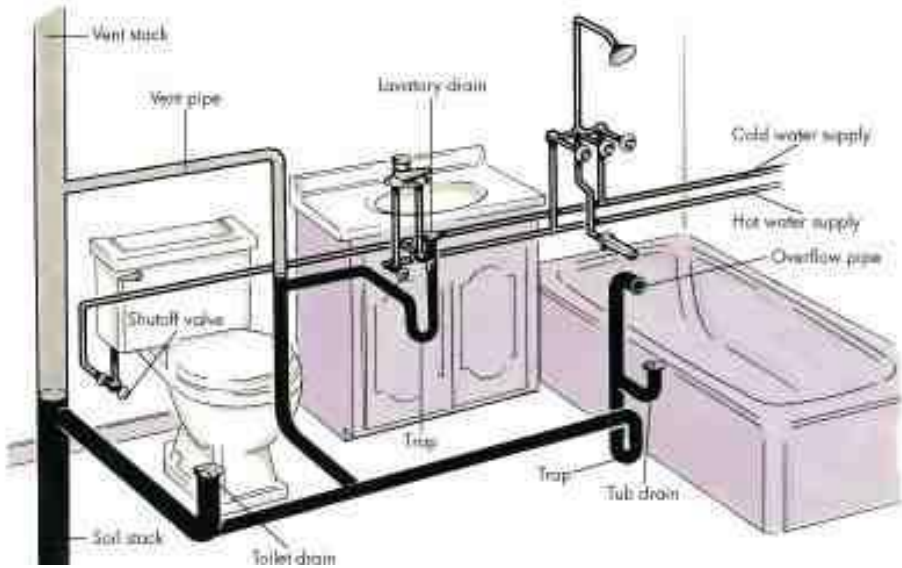
7 Control Your Work

- **Build Business Rules**
  - Policy aids Standards
- **Establish or use existing Change Control Mechanisms**
- **Develop Statement of Operations**

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7 Control Your Work

- Be Proactive
- Add Variety
- Set Priorities
- Ensure your Team understands the importance

Examine Your 1 **Resources**	**Identify Your** 2 **Customers**	**Launch Your** 3 **Services**	**Establish Workflow** 4 **Management**	**Establish Query** 5 **Closure Methods**
	6 **Establish Reporting**	7 **Control Your Work**	**Communicate with** 8 **Your Customers**	
		Survey Your 9 **Customers**	**Redo Steps 1 to 9** 10 **Regularly**	

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8 Communicate with Your Customers

- Get Out and Mix
- Create Channels and Utilise
- Evangelise your Support offerings
- Learn Customer Language

THE OUTSIDE WORLD

Resource requests
Complaints
Results
Impressions

Influencer marketing
Resource requests
Enquiries
Solutions

HELPDESK

Results
SHAREPOINT RESOLVERS

SUPPORT ADMIN
USERS

Priorities
Solutions

Commercial pressures
Complaints

Quality surveys
Commercial pressures

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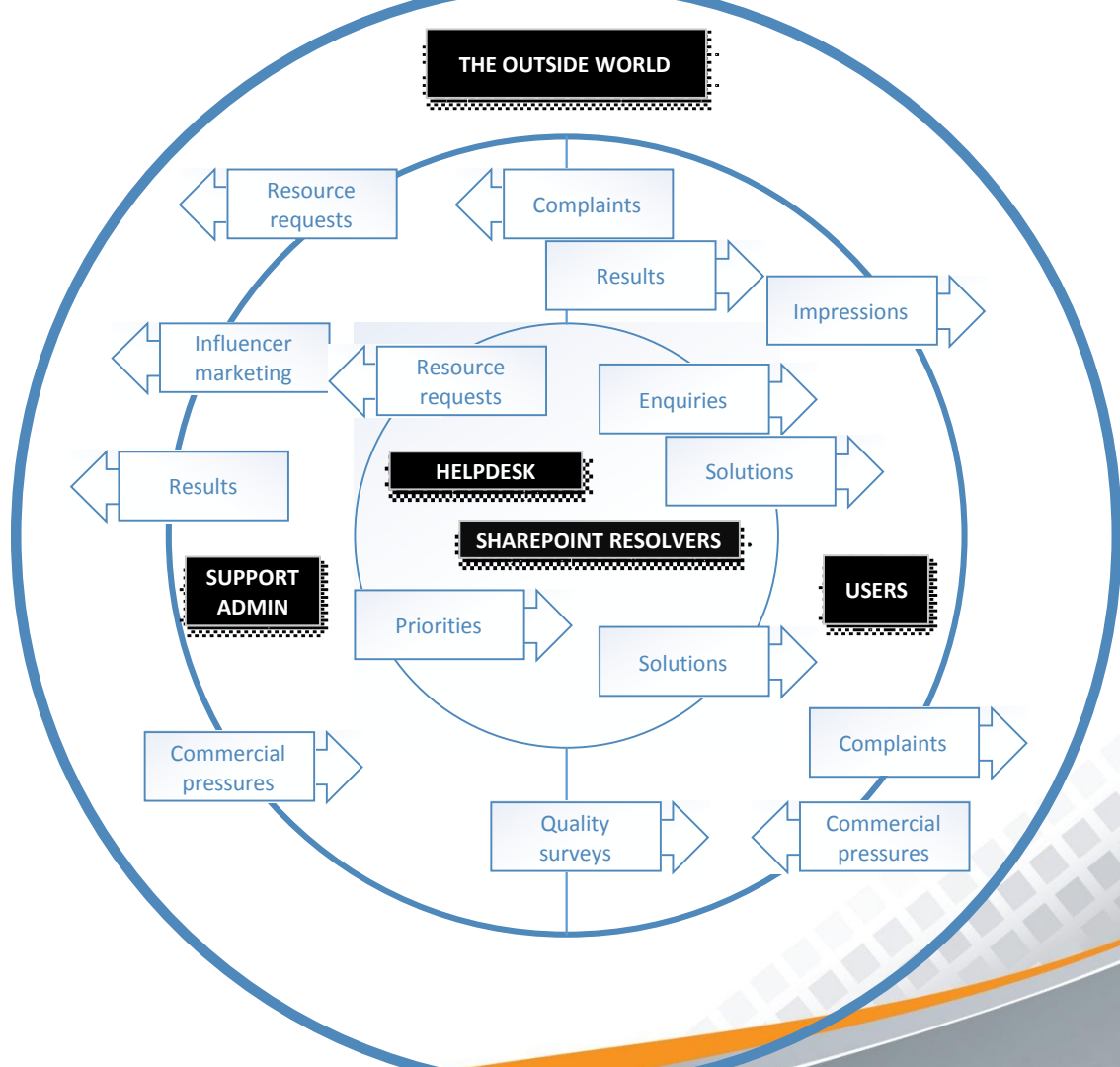
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8 Communicate with Your Customers

- Personal contact is vital
- Utilise channels of communication
- Your SharePoint Champions are a leading light

| Examine Your 1 Resources | Identify Your 2 Customers | Launch Your 3 Services | Establish Workflow 4 Management | Establish Query 5 Closure Methods |

6 Establish Reporting   7 Control Your Work   Communicate with 8 Your Customers

Survey Your 9 Customers

Redo Steps 1 to 9 10 Regularly

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- Don't just Survey everyone
- Carry out Random Phone Polling
- Consider Participation Rewards
- Conduct and LISTEN to what people say

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9 Survey Your Customers
- Establish Methods of Surveying
- Make improvements
- Review to match customer expectations

Examine Your ☐ **Resources**	**Identify Your** ☐ **Customers**	**Launch Your** ☐ **Services**	**Establish Workflow** ☐ **Management**	**Establish Query** ☐ **Closure Methods**

⑥ Establish Reporting **⑦ Control Your Work** **Communicate with ⑧ Your Customers**

Survey Your ⑨ Customers **Redo Steps 1 to 9 ⑩ Regularly**

- Review and Schedule
  - Repeat steps 1 to 9
- Be aware of the solution delivery model

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10 Continuous Improvement — Don't Rest, no matter how good you are!

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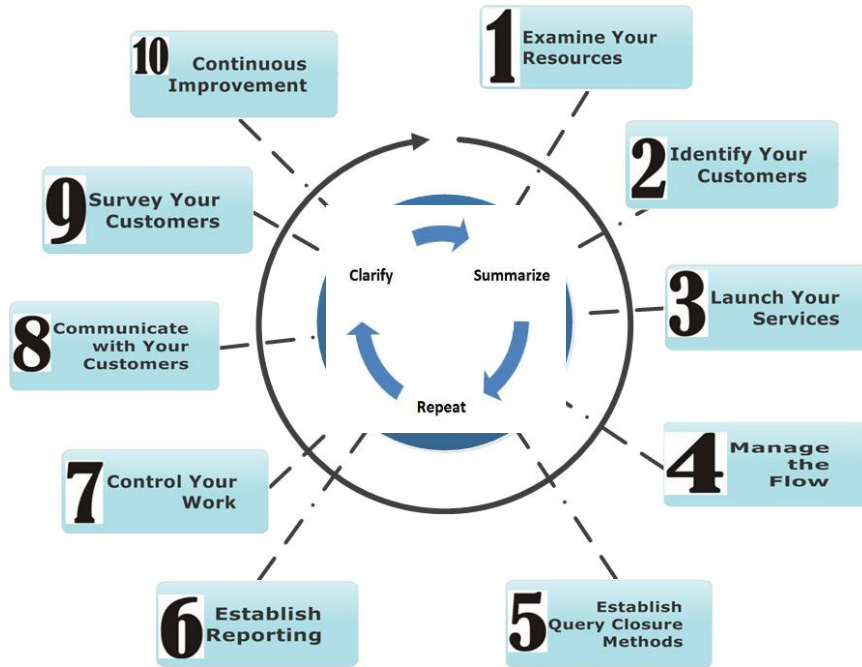5 Establish Query Closure Methods
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Summary

- Customer Centricity is key to support delivery

- Support Model should ultimately achieve enhanced User Productivity

- Support is not just for Problem Solving, it's for continuously anticipating and enhancing the user experience

Resources

- Get the books
  - *SharePoint 2013: User Adoption and Governance* due in May 2013, Chapter 6
  - *Managing and Implementing SharePoint 2010 Projects*
- Other Resources
  - **SharePoint 2013 Helpdesk Site Template**

  - **Starting off a successful SharePoint Platform Support model**
  - http://www.sharepointgeoff.com/starting-off-a-successful-sharepoint-platform-support-model/

  - **SharePoint Feasibility Study**
  - http://www.sharepointgeoff.com/carrying-out-a-sharepoint-feasibility-study/

  - **Consumerisation and SharePoint Security Challenges**
  - http://www.sharepointgeoff.com/consumerization-and-sharepoint-security-challenges/

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- Yammer: Geoff Evelyn
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- 2 x SharePoint MVP
- Author:
  - Managing and Implementing SharePoint 2010 Projects
  - M.O.S SharePoint 2010 Study Guide
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