

BMC Service Desk Express: Benefits of Training

A Happy Client Is A...

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As I close in on my 14th year with the Service Desk Express product line I wanted to discuss a topic that I have seen is far too overlooked. The topic is Training. Please note that the information in this article should be considered for any of our products and not only SDE.

As you can imagine, there have been occasions throughout my career where I have been asked to speak to a Client who has grown frustrated with our application and is considering ending their relationship with us. My discussions with the Client always come down to the root of the problem being one of two things, sometimes both: Scope of Work or Training. We will focus on Training.

A mistake often made is an assumption based on the fact a Client may have owned the product for X number of years therefore they must be happy and have an understanding of the product. This assumption is incorrect and can be costly.

How can it be costly?

Simple formula:

Lack of Knowledge + Lack of Time/Interest = Opportunity for Competitor.

Typical areas the untrained Client is unaware of and their impact include:

Module	Perception/Impact
Customization Tools	<p>Client is unaware the system can be configured to meet their needs using out of the box tools.</p> <p>Client is under the assumption SDE is not able to capture all of the information required for their organization.</p> <p>Client will feel that if we are not capturing the appropriate data and they are not getting accurate reports they are in need of a new solution.</p> <p>NOTE: Many people think of form customization in terms of aesthetics and overlook the critical reporting aspect. If the data is not being collected, it cannot be reported on.</p>
Quick Tickets	<p>These three areas have two things in common: Standardization & Workflow.</p> <p>Quick Tickets as well as Incident Type & WO Generators allow for the creation of standardized templates that can include routing based on the given scenario. In addition, fields such as Category and Incident Description, among</p>
Incident Type & Work Order Generator	
Business Rules	

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	<p>others can be populated at the template level.</p> <p>Business Rules allow for the creation of customized workflow automation. This can include notifications sent to staff at desired times under desired conditions as well as the creation of and/or updating of records.</p> <p>Client is under the assumption SDE does not have anything in terms of standardization and workflow.</p> <p>In regards to Change Management workflow, the Client is under the impression that there is too much manual intervention in regards to the creation of Change Assessments, Change Approvals, etc. This process can be automated based on desired criteria.</p>
Asset Management	<p>Many Clients who have not been trained are under the impression Asset Management is not part of the standard product and are surprised to hear Purchasing is included as well.</p> <p><i>If the Client is unaware of this being a standard component of SDE it also means missed opportunity in regards to:</i></p> <ul style="list-style-type: none"> • CME • SMS Integration • 3rd party Integrations • Additional Consulting Services.
Integration Engine	<p>If a Client is not on a current release, they may not know of the Integration Engine. The fact it is part of the standard SDE release also provides the incentive to upgrade.</p> <p>This means they may be using unsupported means of populating their database which in turn could result in additional issues.</p> <p><i>If the Client is unaware of Asset Management being a standard component of SDE it also means missed opportunity in regards to:</i></p> <ul style="list-style-type: none"> • CME • BPM • SMS Integration • MOM Integration • 3rd party Integrations • Additional Consulting Services.

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Quite often the current System Administrator has inherited the system from their predecessor. Most commonly, the person inheriting the system has not received training of any sort. As a result, this person is forced to learn this new application on the fly while in the midst of dealing with all of their other daily responsibilities.

This lack of focus leads to someone who feels the application is not capable of meeting their needs and therefore must be replaced.

Now, this mindset is not exclusive to someone who has inherited the role of System Administrator. Many organizations purchase new systems with the assumption their staff can figure out the application as they go along. The results typically are the same as mentioned in the previous scenario. In fact, I was recently asked to speak to a Client as they were considering replacing our product with a competitor.

Fortunately, a flag went up immediately at the start of the discussion. The principal speaker (there were 12 staff members in the conference room) mentioned how they were going to give us another chance because they heard SDE 9 allowed for database and form customization capabilities. – I should note this functionality has existed since SupportMagic 3.0, which was the first SQL based release of Magic and was released around 1996.

Now in the case I am referencing, I assumed the principal speaker had recently inherited the role of System Administrator. Actually, they had not. It turned out they had been the System Administrator for 8 years. This was most concerning considering the functionality referenced had been around over 10 years. I then asked if they'd been to training and in fact they had not. After a brief discussion on the importance of training and providing other examples of system functionality, the Client decided to send 2 people to our Admin classes.

In order to capture the Client's interest, the Client should understand the benefits of attending training. I reference as follows:

- They have purchased an outstanding tool that can be tailored to meet their requirements and help them accomplish their goals. Now, they have to understand how to get the most out of their system so they can quickly see results. The system can be as simple or as complex as needed based on the organization's requirements.
- Our off-site training classes are beneficial due to the fact the student is in a controlled environment. They are not subject to the constant interruptions of an on-site session due to the daily happenings within their business.
- With our training classes, they are not only learning from a trained professional Instructor, they are also learning from the other students in the classroom. This is because a training class typically goes into a workshop format and ideas are shared among the attending students.

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- In the case of SDE, we have several classes that can be taken in a phased approach as needed. There are three levels of System Administrator classes as well as other offerings. These offerings include area such as Administering the Integration Engine, Asset & Change Management as well as 2 levels for Crystal Report Writing.

We have to be sure the Client understands the benefits that may not be obvious. As an example, on the topic of Crystal Reports a Client should understand the benefit of the BMC offering versus a class offered internally within their organization or even from another vendor. In the BMC classes, they will not only learn how to use Crystal Reports but they will also learn the SDE database structure as they will be writing reports for Incident, Problem, Change and Asset Management in the class. An added bonus is this could result in new interest in things like expanded Asset Management (CME opportunity or possible SMS Integration) and Change Management (opportunity to sell the Change Management offering).

Imagine if you bought a car without knowing any of the basics about cars. You would think you would need a new one because it stopped working after the first day or two. No one ever told you about gas being needed. This was a simple fact you were trained on since childhood.

So to finish the title of this article: A Happy Client Is A Trained Client.

The Client bought our race car, now let's keep them running.