EVOLVING FACE OF EMPLOYEE HELPDESK SOLUTIONS

Abstract

Gone are the days of a conventional employee helpdesk which provided either an email or IVR based option for employee case resolution. As the voice of the employee gains strength, organizations are looking for ways to engage them intelligently across different channels of communication, understand their concerns and use them as ways to retain them.

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1. Employee Engagement – How crucial?

"Put on the eye gear and you are all set to travel into the world of learning", "This is Jenny. How may I help you today with your onboarding request?", "What emoji will you give your training experience?" ! "A one stop portal for all your needs.", Imagine this digitized employee experience within your organization! Conventionally, organizations have invested massively in creating impactful customer journeys for their end consumers, weaving a NexGen, contemporary and engaging experience for them.

While encompassing this lightning experience for customers, as a part of the workforce management strategy, are organizations doing enough to offer an engaging and collaborative work experience for their most valuable assets -their employees?

Workforce Management, a key area for any organization, includes managing the workforce, forecasting and budgeting, staff scheduling, assignments, work hours and attendance, managing employee performance, compliance with organizational policies, payroll and benefits administration, leave planning and more. As an extended WFM capability, are organizations investing enough to provide the workforce with a comprehensive employee helpdesk solution helping them be engaged and enabling personalized experience within the organization while continuously listening to them?

An employee during his or her tenure with the organization, goes through numerous processes, workflows and requests regarding onboarding, inductions, asset allocations, trainings, key points of contact and the different systems which can help manage their work within the organisation. Some of the common helpdesk queries from employees are:

1. Is there a self- help portal for easy access to my records and data?

2. Is there an organizational policy repository for easy reference?

3. Can I get some help during my onboarding?

4. Is there a portal with common FAQs?

5. Is there a portal or a community for peer collaboration?

6. Can I see my centralized data in one system?

7. What are the benefits which I am entitled to?

Allan Parker

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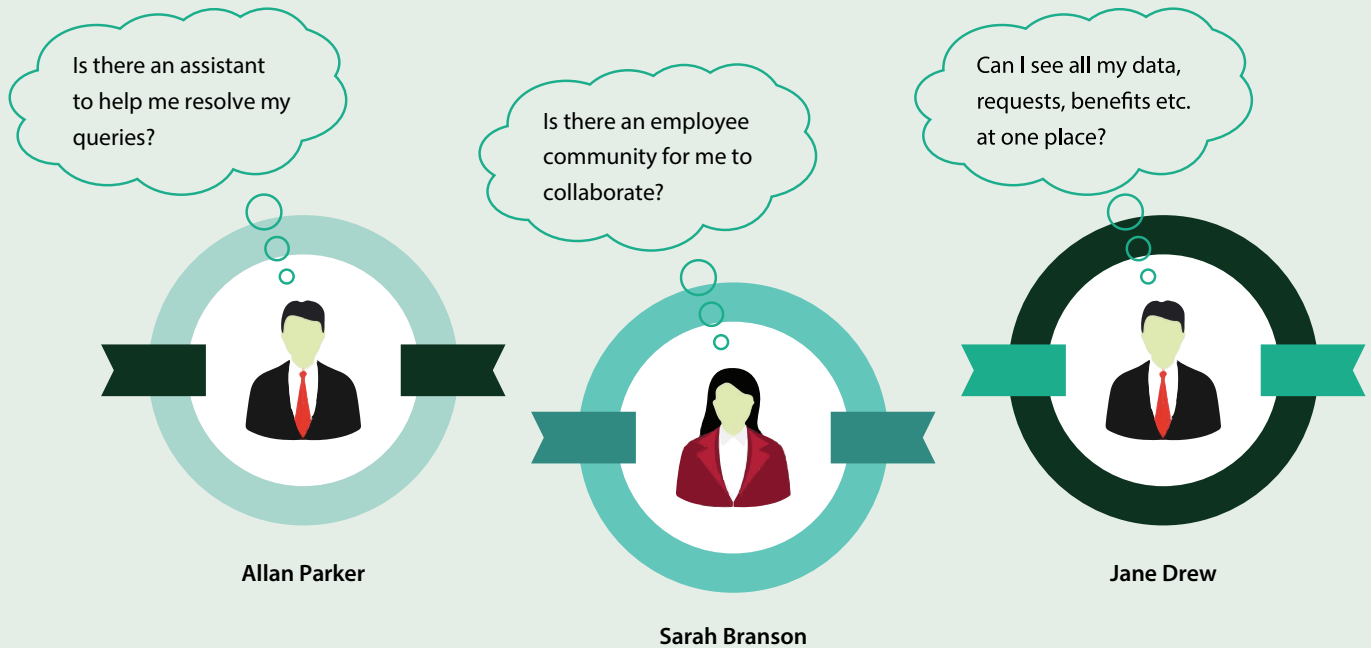
With user experience being reimagined at a stellar pace, without offering an interactive and engaging employee experience, organizations will find it hard to manage their expectations and satisfaction. This white paper explains the need, key ingredients and design principles of building an employee-centric helpdesk solution with digital flavours for personalized employee engagement, advanced functions like immersive technology based learnings, continuous feedback for process improvement, centralized knowledgebase for self-help, data driven analysis for next best action etc – all aimed at delivering the much-needed LIGHTNING employee experience.

2. Trends redefining Helpdesk solutions

With the surge in smart devices, service channels, social media usage, advanced technologies like IoT, machine learning and others, solutions in every space are being re-curated to have digitization, automation and efficient tags. Helpdesk solutions while meant for internal usage are no longer untouched by these disruptive technologies. Further, the increasing IT population in every organization is immobilizing the conventional manual helpdesk operations.

Based on the study of the evolving service trends, helpdesk solutions will undergo transformation to induct the following key trends:

- **Consolidation of helpdesk systems across business functions** - Be it a Finance helpdesk, an HR help desk or a Facilities helpdesk, organizations are attempting at consolidation of all helpdesk functions, data, and features into one system to reduce the operating cost of managing discreet solutions and improve data driven decision making. At the same time a consolidated helpdesk solution will help employees get a one stop solution for all their organizational needs ranging from finance queries to onboarding requests.

- **Automation for recurring requests** - Use of workflow or intelligent automation for recurring issues, cases, requests and tasks to reduce the administrative effort of providing a manual resolution.

- **Virtual Assistants** - With Virtual Assistants and intelligent Bots driving the service environments, helpdesk solutions are also seen inducting Chatbots into their eco-system. Be it responding to employees on, typical issues, helping HR managers understand their work load and guidance on providing quick resolutions, Bots are being looked as the advanced messengers who can spin required resolutions and even predict the next best action based on effective data analysis.

- **Social Media Integration** - With social media being a key feature in the way to digitization, expectations are that the helpdesk solutions provide social sentiment analysis to predict the happiness quotient of the employee with respect to the organizational policies or work culture.

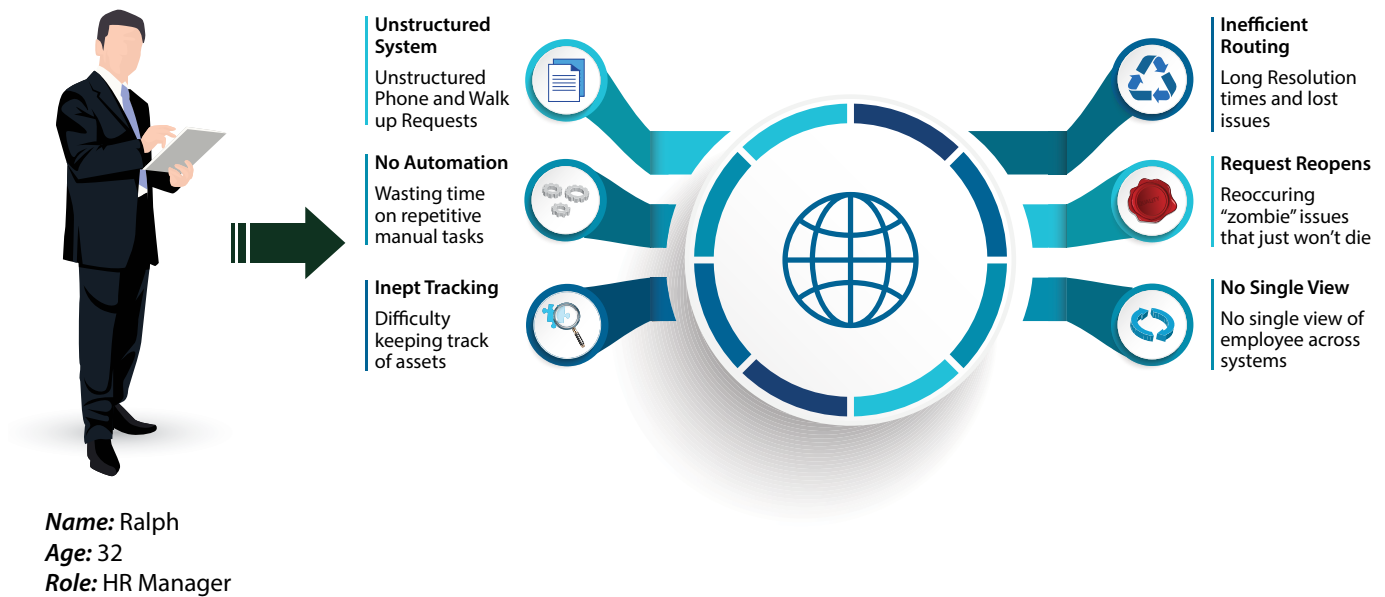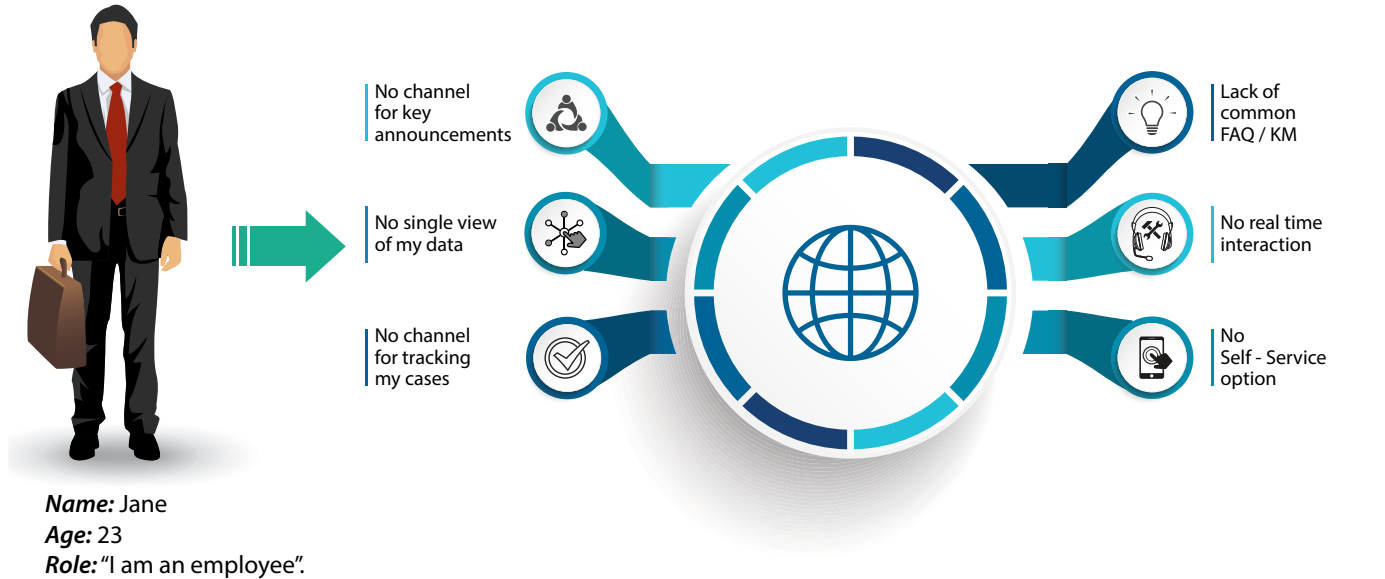- **Self-service Portal or Communities** - A self-service portal or community feature enabled helpdesk solution will not only help in spanning a personalized experience for the employee but also help in request deflection. Knowledge, common FAQs, peer collaboration and mobile-enabled portals go a long way in delivering a less laden helpdesk and enhanced employee satisfaction. Such portals could also be enabled to capture the sentiment of the employees as well as launch new policies and announcements.

- **Digital Tutors** - With the use of immersive technologies like Augmented Reality or Virtual Reality, organizations can train their employees on latest technologies. Virtual Reality based trainings are increasingly being a part of organizational helpdesk solutions helping employees self-train themselves without the need for classroom-based sessions.

- **Machine Learning or Data Driven analysis** - Use machine learning algorithms or data driven analysis to analyse employee specific historical data for retention plans, policy changes and more..

These trends are shaping the NexGen helpdesk solutions designed to deliver an employee centric, automated and efficient helpdesk experience.

3. Employee Helpdesk Solution – The Current Scenario

Traditionally, helpdesk solutions were considered as a low cost, unstructured and transaction-based solution, aimed at providing reactive responses to employee requests. A study of the historical Helpdesk solutions showcases the following challenges across the key personas of Employee and BEF Specialists:

No channel for key announcements

No single view of my data

No channel for tracking my cases

Lack of common FAQ / KM

No real time interaction

No Self - Service option

Name: Jane
Age: 23
Role: "I am an employee".

Unstructured System

Unstructured Phone and Walk up Requests

No Automation

Wasting time on repetitive manual tasks

Inept Tracking

Difficulty keeping track of assets

Inefficient Routing

Long Resolution times and lost issues

Request Reopens

Reoccuring "zombie" issues that just won't die

No Single View

No single view of employee across systems

Name: Ralph
Age: 32
Role: HR Manager

Systems with all these challenges, were neither employee-friendly nor HR-friendly, leading to an Employee Helpdesk solution meant for reactive responses.

4. Elements of the Proposed Solution

In order to keep up with requests of tech savvy employees while keeping a tab on operating costs of maintaining a Helpdesk solution, organizations need much more than an Excel based or manual helpdesk solution. Let us take a look at some of the design elements involved in crafting an efficient Helpdesk solution:

1. Design to cover the stated and unstated expectations towards the solution.

Stated Requirements for a helpdesk solution - Typically, these requirements are known needs of an employee helpdesk solution:

- 360-degree view of the employee across functions like Finance (attendance & payroll), Facilities (asset details), Travel (travel history) etc. for quick decision making.

- Multi and Omni Channel Case or Request Management – Portal, Computer Telephony, Email being the most preferred channels.

- Access to knowledge at finger tips – Easy and quick access to organizational knowledge repository both for the employee as well as the business enabling functions (HR, Finance, Facilities).
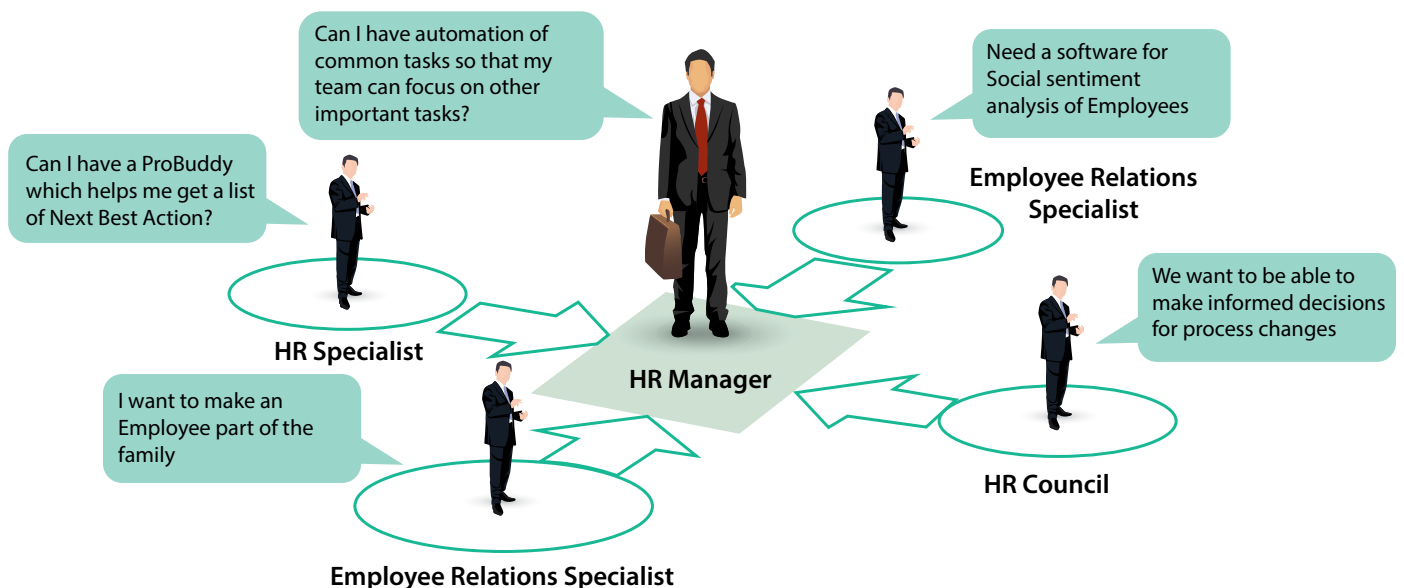
- Intelligent Assignment Rules – Request assignment to the most eligible personnel for quick resolution

- Effective Data mining and Analysis for best actions.

- Data Security – In alignment with the organizational role hierarchy, show only what one needs to see within the helpdesk solution

- Feedback based improvement – Ability to capture post service feedback and time-based feedback for performance analysis and improvements

- Advanced Features like Chatbot, Social Integration, Gamification induced performance improvements

Unstated requirements for a helpdesk solution - This category of requirements, while are never discussed on paper but are implicit requirements of delivering a robust helpdesk solution:

- Providing apt tools-based automation to BEF Specialists while servicing employees, speedy and efficient access to all the data that pertains to the employee that they are servicing.

- Single helpdesk solution across business functions – Finance, Facilities, Human Resource, VISA etc.

- Alignment with out of the box system configuration features.

- Improved User Experience for employees as well as the BEF (HR, Facilities, Travel Agents) users.

- Seamless, scalable integration with external systems for data exchange.

- Intelligent analysis of data for decision making – Machine Learning induced data analysis and forecasting.

- Automation savvy solution – Automated responses or capture of faults and cases.

2. Persona based Design of the solution - While meeting the above set of requirements ensures the key to success, another key design aspect is to curate the solution using a Persona based approach. A solution which is designed to meet the Stated and Unstated requirements, KPIs, Pain Points of the intended personas/ users. For example, the solution should have the essential elements to be able to address some of the below common requirements from the Human Resource fraternity in their helpdesk journey:

Similarly, the solution should be comprehensive to meet employee centric requirements such as:

- I want to know raise onboarding requests with minimum clicks!
- I want to be able to access the organization specific knowledge base to equip myself with the policies/rules!
- I want the system to know me and my history while raising requests so that I don't repeat!
- I want my request to be assigned to the relevant personnel without traversing through series of re-assignments!
- I want to be able to get a timely update of the organizational announcements!
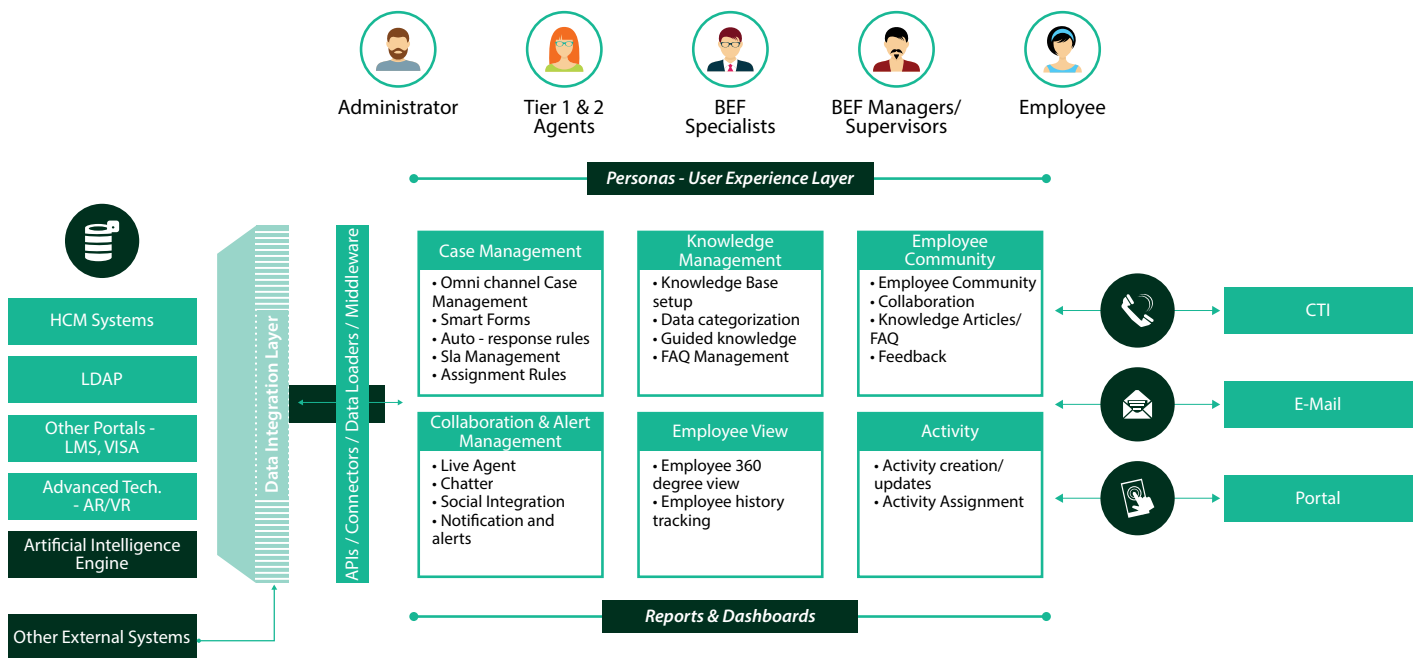
5. Indicative Architectural View of the Solution

After a look at the trends, challenges and the required design elements, a SMART Employee Helpdesk solution should have the following aspects integrated into it:

- Service Cloud based service console for the BEF agents, specialists and managers to work upon

- Community Portal for the employees to login for all their employee centric functions – Request initiation, data View, policy access, live interaction with BEF personnel, view organizational announcements and many more.

- Omni channel service setup

- Knowledge setup for organizational policies, induction kits etc.

- Automation powered assignment, SLA management for quick actions.

- LDAP based single sign - on

- Seamless integration with external or employee master systems – HCM or Workday for Employee Master data

- Digital and/ or advanced features like Artificial Intelligence or machine learning based employee centric data analysis and forecast, immersive technology-based learning.

Administrator | Tier 1 & 2 Agents | BEF Specialists | BEF Managers/ Supervisors | Employee

Personas - User Experience Layer

Data Integration Layer

APIs / Connectors / Data Loaders / Middleware

HCM Systems
LDAP
Other Portals - LMS, VISA
Advanced Tech. - AR/VR
Artificial Intelligence Engine

Other External Systems

Case Management
- Omni channel Case Management
- Smart Forms
- Auto - response rules
- Sla Management
- Assignment Rules

Knowledge Management
- Knowledge Base setup
- Data categorization
- Guided knowledge
- FAQ Management

Employee Community
- Employee Community
- Collaboration
- Knowledge Articles/ FAQ
- Feedback

Collaboration & Alert Management
- Live Agent
- Chatter
- Social Integration
- Notification and alerts

Employee View
- Employee 360 degree view
- Employee history tracking

Activity
- Activity creation/ updates
- Activity Assignment

CTI

E-Mail

Portal

Reports & Dashboards

(*)BEF – Business Enabling Function

6. Best Practices

With the transformation of conventional helpdesk solutions being explored by organizations actively, Infosys has conceptualized and built a NexGen Helpdesk solution which utilizes the power of a CX Cloud CRM platform like Salesforce, associated add-ons such as Einstein based artificial intelligence, Wave Analytics based reporting framework and API first technology to seamlessly integrate with peripheral systems and portals. Leveraging this experience, here are some best practices of building an advanced, digital and intelligent Helpdesk solution on CX Cloud platform:

• Invest in a good service console which has omni–channel service communication ranging from computer telephony to email based cases to web-based case processing

• Include a 360-degree view of employees into the service console for better understanding of the employee and his or her history to aid the resolution process

• *Implement a robust and intelligent knowledge setup:*

  - Effective knowledge content creation and review process to provide relevant knowledge articles to both agents and employees thereby increasing call deflecting rates

  - Minimize knowledge maintenance with self-learning capabilities that dynamically bubble the best answers to the top.

  - Encourage the use of knowledge articles as an integral part of a user's everyday job.

• Reduce risk of sensitive employee data being compromised by planning and implementing distinct data security features like profiles, role hierarchy, sharing rules etc.

• Bring in necessary automations like Case Category based SLA compliance, assignment rules, automatic responses, smart text-based email responses etc. to weed out manual errors and effort

• Give your employees a robust self-service portal – a one stop shop for all their needs ranging from the ability to initiate cases, access organizational policies, chat with available agents, maintain their employee specific data, access to other portals like LMS, VISA etc., key contacts etc.

• Implement a mobile strategy for the employee facing portal for ease of adaption and on-the-go access

• Invest into social channel-based sentiment analysis to understand the employee pulse and take apt actions like case creation, FAQs or policy refinement

• Design effective analytical snap shots of key entities like case, knowledge etc. to gain insight into usage, efficacy and needed improvements

• Invest into employee satisfaction features like ticker based organizational announcements, feedback surveys etc.

• While advanced technologies like AI, ML, Chatbot sound impressive and futuristic, think and invest into them based on usage requirements, need for advanced automation, user volumes, KPIs etc.

• Lastly, think out of the box to keep the design smart, simple and scalable

Powered by these best practices, organizations can achieve significant business benefits for their helpdesk solutions like :

• 10-15% reduction in inbound call volumes

• 15% increase in case deflection

• 10-20% increase in employee satisfaction index

• 10-15% increase in SLA adherence

• 15% increase in productivity

While these are few basic best practices for achieving an improved, modern helpdesk solution, the list of cool features does not end here – AI-led predictive analysis of employee attrition, machine learning based agent capacity planning, data driven analysis for changes in organizational policies, Chatbot based next best actions are some of the other heroes in action.

Conclusion

Today's helpdesk systems are no more an on- call desk with IVR options for ticket resolution. Amidst of the competition of delivering solutions aimed at providing better customer as well as user experience, these helpdesks have evolved over time to blend in the needed UX and CX features, voice of the employees and aid for the HR fraternity.

With this paper, we have attempted to provide the recipe of a SMART Helpdesk solution: a solution which has the right mixture of technology trends, alignment with market changes and employee centric features while meeting the stated and unstated needs of a conventional helpdesk.

About the Author

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Bijayita Mohapatra has 15+ years of experience in various domains and technologies across Oracle and Salesforce suite. She has worked for customers across varied domains like Telecom, Manufacturing, FS, Services and has been instrumental in designing CX based solutions/ accelerators. At Infosys, she is the competency anchor for Service and Field Service cloud responsible for Solution Design, Presales, GTM work and Project consultancy.

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