

Selecting the Best Training Mix for Help Desk Analysts

“Reskilling” to anticipate change is one of the most difficult tasks facing support organizations. Enterprises are embracing computer-based training tools for help desk learning, while also using more traditional training methods.

Core Topic

IT Management: IT Support Sourcing
Options

Key Issue

How will organizations identify and select the proper mix of internal and external services to maximize service levels and minimize support costs?

Note 1

Training Types Examples

On-the-job training options:

- Formal mentoring program
- Organizational relationships, e.g., Tier 2
- Just-in-time training systems
- Knowledge base
- Manuals
- Tutorials

Classroom options:

- Role playing
- Case studies
- Simulations
- Discussions
- Lectures
- Brown-bag lunches

Self-directed training:

- Computer-based training
- Video training
- Self-paced programs
- Reading and research
- Conferences
- Industry associations
- Subscription services

The training process should involve establishing better relationships with business units and searching for effective ways to deliver training on demand. New training technologies, such as computer-based applications and Internet training, provide information on demand, offer databases of shared knowledge and deliver just-in-time training that transcends traditional boundaries. This *Research Note* highlights three main categories of training: on-the-job, classroom and self-directed (see Note 1 and Figure 1).

On-the-Job Training: Rotating personnel through tasks is an effective complement to formal help desk training. Allotting non-phone time increases staff competency levels, encourages interest in a specialty area and capitalizes on the talents of the IT support staff. Cross-training people and optimizing support resources includes providing mentoring (see *Research Note* TU-05-3723, 25 September 1998), using scripts, or accessing a knowledge base to familiarize staff with the enterprise’s products and services, support processes, communication methods and consolidated service desk (CSD) management systems. Help desk analysts can also develop expertise and offer a backup for Tier 2 projects. All new support analysts should receive on-the-job training and mentoring before handling end-user inquiries.

Pros and Cons: On-the-job training has a number of advantages, both for the trainee and the IS department. It does not require time away from the job, and as a result, learning is tied to specific skills used on that job. It is developed in-house by help desk professionals, so it is easily customized to real-life situations. Finally, its low cost will have only a minor impact on training budgets. On the down side, there is often a lack of rigor in course development, and it is usually given a low priority compared to work. If it is not carefully managed, bad habits can be reinforced.

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Also, this type of training tends to become very regimented, leaving little room for experimentation.

Figure 1
Training Type by Enterprise Style

Type	On-the-Job	Class	Self
A	35%	15%	50%
B	45%	35%	20%
C	30%	55%	15%

Source: GartnerGroup

Classroom Training: Empowering the staff with the appropriate skill sets is important in internal management, especially for avoidance of burnout. Help desk analysts should be fully trained on technology before all releases and participate in developing the curriculum to be used later for end-user education. A formal training program should not only educate the support staff on the technology, but also on customer service skills.

Pros and Cons: The advantages to classroom training are that it is tied to a specific objective and comes with professional delivery and materials. The classroom setting also minimizes disruptions and provides an environment more conducive to learning. This also means, however, that the employees must take time away from their job responsibilities. Classroom training is also expensive, creating a large “hit” to the training budget. Knowledge gained through classroom training may not easily transfer to the job setting. Also, reinforcement of learning will be required, as knowledge retention is typically low.

Self-Directed Training: It is critical to keep an up-to-date reference library and knowledge base of problem resolution data, including online documentation direct from vendors or from third-party publishers. Compiling a repository of resource documents, including manuals for all applications, provides a main resource for leveraging knowledge. Vendors and training firms can help provide ongoing technical training for help desk staff, offering a range of training, from books, videos and training software to free half-day seminars and week-long developers’ conferences.

Pros and Cons: Self-directed training can be a powerful learning tool, as it is delivered just-in-time, and is readily reviewed and used. It easily incorporates technology-directed instruction. The knowledge gained is directly sought by the trainee, so there is a clear, demonstrable learner benefit. It is difficult, however, to enforce rigorous standards for self-directed training, and the fact that a user completes a course does not necessarily ensure mastery of the topic. The courses are not customized to the environment, so the skills learned may not transfer directly to the skills needed for the trainee’s job.

Bottom Line: On-the-job, classroom and self-directed training all come with their own inherent benefits and risks. Successful IS managers will draw from a training portfolio of all three types, using the advantages of one to neutralize the disadvantages of the others. A well-planned IT training program will use informal training (e.g., on-the-job and self-directed) to reinforce principles learned through formal, classroom education.

