

Deliverable 2.6 Help desk service for SMEs report

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1. Introduction

A help desk is the key contact point between IT and the user group, in our case the regional SMEs. Its prime mission is to deal with SMEs enquiries and problems concerning IT and e-Commerce services. Its quality will be measured by how efficiently and effectively it satisfies that mission. Without a good help desk, users will fail to exploit the features, advantages and benefits of the IT applied to their business. The Help Desk can exist within an organization (as an Area) to provide knowledge and support to the regional SMEs in e-commerce related activities.

2. Objectives

2.1 General Strategic Objectives

The main purpose of the Help Desk developed under the LC will be to provide advice to small and medium enterprises that have interest in implementing e-commerce. To ensure the efficiency and effectiveness of this process, the LC will carry out those tasks structuring them at two levels:

- **First Level**

It is focused on solving SME's questions about the different ways to access e-commerce world, advising them about the possible integration levels of this new business philosophy (e-commerce) within the organization structure and provide into an event and arrange appointments. According to the needs and the desired level of compromise of each SME with e-commerce (own web-site, electronic catalogue, web-based selling application with or without on-line payment, system integration, ERP, CRM, etc.), the LC will inform the SME about the characteristics of products and services offered by the different service and solution providers.

NOTE: This is second level

- **Second Level**

It seeks to match the needs of SMEs with the organisations/enterprises that offer e-commerce products and services (solution developers, ISPs, financial institutions, etc.) and to promote the contact between SMEs and products/services suppliers.

2.2 Regional Support Centre Objectives

2.2.1 Cyprus

The Help Desk as part of the activities of the e-Commerce Leveraging Centre will offer services to the customer. Two types of customers can be identified for the Leveraging Centre, the MERCHANT and the CONSUMER. The aim of the help desk is to act as a liaison between customer and Consortium partners for those services that they required special treatment and to be able to offer online assistance for standard type of request. Special request will be forwarded to the field expert for handling.

The list of the main area services to be offered is as follows:

- General information. This can be information on the program, on e-commerce activities and upcoming events.
- Consultancy: Inform about the areas on which consultancy can be offered.
- Training: Information on training areas and upcoming programs
- Platform Services Information about the services that the platform can offer.

The help desk would provide these services with the following methods. It will utilise as much as possible the partner's resources and outsource those activities that expertise does not exist within:

- Over the telephone
- Visit on site - Customers will be able to personally visit the LC
- Through e-mail – Send requested info through e-mail
- Over the WEB - A web site will be developed

2.2.2 Galicia

One of the galician support centre objectives is to link the SMEs and e-commerce initiatives with the regional IT providers. The galician help desk will act as an first information and assess step for the SMEs, in order to solve questions and doubts related with e-commerce and IT. More complicated questions, aims or projects will be studied more in-depth and a list of regional IT providers that best suits the SMEs needs will be forwarded them so that they can begin a business relationship with its new IT provider.

The Galician approach is to build a web application for the help desk so that it could permit a best performance in the management of the enquiries. Due to a lack in human resources, the best approach that will increase the enquiries throughput is a web enquiry type minimizing the telephone call enquiry type.

2.2.3 Pomerania

The Help Desk in Pomeranian Region carries on two levels of consultancy and support. First one is the basic one, designed for the entrepreneurs, who start their activity in Internet. Second one is prepared for more advanced clients of Leveraging Centre.

The list of the services to be offered is:

- General information: about e-MINDER project, the use of Internet, and opportunities of running e-business.
- Support: Inform about the areas on which consultancy can be offered- like Internet auctions, website building, Internet shopping, security protection etc.
- Training: Information about education activities, coming up seminars and trainings.

The methods used, to giving the consultancy to the public are as follows:

- Phone calls
- Via website: with the use of Internet forum and chats.
- Through e-mail

3. Main Guidelines

3.1 Organisational Structure

The first approach to the help desk is to size the organisational structure and design it to resist the expected demand. Another important factor is that the help desk must be modular in order to let it grow if the demand grows too.

There structure is divided in two levels:

- In the **first level** there are support consultants / engineers with the duty of handle all the enquiries and scalate the most complicated ones.
- In the **second level** there are analysts that will engage the prioritized enquiries for a better resolution, since these type of queries require an in-depth study for its successful resolution.

The Consultants/Analysts designated to carry out the query management are responsible of:

- Gathering information, leading research and analysis of data and events as well as query updating.
- Queries management focussed to determine its actual condition is under the consultant/analyst responsibility.
- Required corrective/preventive actions can be initiated to ensure the successful development of the query process. Monitoring and analysis are necessary to lead the query to its finished condition.
- Analysis of queries answered at first level or second to determine its state change to finished

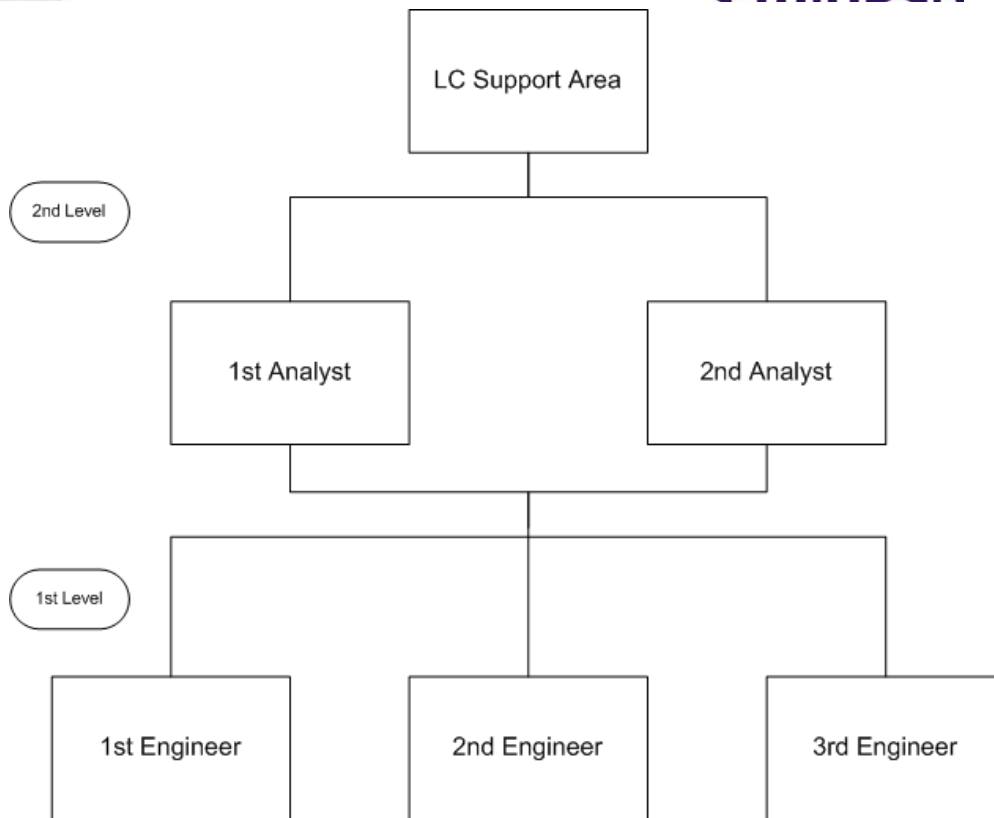


Figure 1: LC Help desk organisational structure module

3.2 Help desk Tools

Some hardware and software tools at least required for the proper running of the help desk:

- Workstations
- Printer
- MS Office based tools
- Internet access and e-mail
- Web site hosting
- Telephone
- Fax

4. Expected process Outcome

The support center embrace different level of activities based on the processing of SME queries about e-commerce. It covers the query information recording, management and the monitoring process. The query information updating and monitoring are focussed on each SME (support center user). The main purpose of this process is to help the SMEs to increase its knowledge about e-commerce , encouraging small and medium enterprise to start their way towards this new business world. Besides the interest in facilitating SME access to e-commerce, the LC's aim is to increase knowledge about SMEs interest in e-commerce, their compromise level and their decision to participate in this new way of business, and to evaluate their results in doing so.

All the information must be stored in a database for an optimal performance of the system. Using a database means that we can manage all the lifecycle of an enquiry (and the generated info) and administer properly the help desk.

The information will be collected and analysed to evaluate object achievement and to reach conclusions about the causes of deviations from expected results. This evaluation must be carried out bearing in mind the final goal: make it easier for SMEs to access e-commerce. It will be necessary to record specific data extracted from the SME 's telephone calls, e-mail or web forms with a certain structure, depending on the desired accuracy level of the help-desk output information. Input data from service/solution suppliers will also act as feedback, giving information about the outcome of the process (contracts, agreements, end of relationship, etc.).

There may be an initial loading of information about “potential users” of the support center. This information may be obtained from the enterprises attending courses, lectures or those that specifically show interest in this initiative. Other information will be collected when each SME submit its first query to the center.

Furthermore, a collection of reports and documents containing general information about e-commerce as well as a catalogue including e-commerce services /products /solutions /suppliers must be available to support center staff from the beginning, giving them enough information that will allow them to answer immediately simple questions outlined by the users (SMEs).

There will be a previous whole set of research duties aiming to collect all the information about “candidate” services/solutions suppliers. The information about products and services will be recorded via web by the suppliers. Furthermore this will include an analysis of the gathered information about potential suppliers and this will result in an evaluation of their products/services. The consultant that leads this analysis belongs to the support center staff.

Initially a consultant gathers information about suppliers of e-commerce services/solutions. Then he analyses and evaluates the offer and includes in the catalogue of available e-commerce services/products/solutions only those that reach an standard.

At the beginning queries are attended by first level staff. These staff members have the initial responsibility to record telephone calls, e-mails, web forms data and the source (SME information if it is not registered yet). If the query issue is simple, they may give an answer on the basis of their own knowledge and e-commerce reports and documents elaborated for this purpose. Even if the query is answered they close it provisionally.

If the query involves a deeper analysis, it is submitted to a higher level. Person designated to manage the query is in charge of the process: analysis of SME requirement needs, service/solutions that can meet them and available suppliers that offers those products.

If SME shows interest in contact e-commerce product suppliers, people in charge of the query will facilitate this. Even though the support center may not be involved in the following steps of the SME-supplier relationship, person responsible for the query management must carry out a periodic monitoring of the query condition and receive/analyse all the issues referred to this that SME or supplier may communicate. This monitoring process may be carried out by an specific level with the responsibility of leading the flow of all the queries to a successful ending.

Process monitoring is required to ensure the “customer” or “user” (SME) get the appropriate information in a reasonable period of time, helping to increase SME’s interest in going ahead with e-commerce. This tracking process will allow LC to enhance its knowledge about SME-suppliers relationship condition.

The two-level structure shows the existence of different roles, each with a different responsibility degree, but this responsibility levels may devolve upon an unique person or a group:

- **First Level**

It collects information about :

- Origin of SMEs questions.
- Level of SMEs queries and depth of their interest in e-commerce:
- Simple questions
- Interest in having web-presence, own portal, online catalogue, online selling (with or without payment and logistics integration)
- Interest in B2B
- Readiness to have its own virtual shop or to participate in an existing virtual mall, etc.
- Willingness to introduce total integration of e-business into organisation structure - ERP
- Interest in CRM, SCM, etc
- SME’s expected income from e-commerce: sales growth, gain access to new markets, customer relationship improvement, etc.
- SME’s resources to face e-commerce requirements: Internet presence, own web, etc.
- SME’s decision to get involved in this new business structure

- **Second Level**

Based upon the set of SME’s resources, requirements and expectations, and after a tailored analysis, this level will suggest the more appropriate service/solution suppliers to fulfil SME needs, and will help SME to contact them. At this step it’ll be an analysis component to determine the actual value of services/solutions offered by suppliers and which are the most suitable for SME needs.

At this level information collected and analysed include:

- Adequate solutions/services suppliers
- Suppliers chosen by the SME to come into contact. Information about these suppliers will be listed and sent via e-mail to the SME.
- Monitoring information: if SME-supplier contact exists and if it was successful, outcome of this relationship.
- Final results of the chain of each SME queries : assessment of the set of contacts results and their influence on the SME access to e-commerce, measurable benefits.

5. Help desk procedures

5.1 Dissemination of information about the support centre team

All the groups will monitor the inquiries process with responsibility for its successful ending. The person assigned is to be responsible of the query treatment and change of assignment if necessary. That's why it is important to provide correctly the identification information of the help desk staff. This will avoid possible interferences between groups in a query closing.

- **First level group: immediate answer:** Name, identification (ej. extension) of support staff at first level (front-line query management).
- **Second level group: specific advice:** Name, identification of expert support staff at second level (for example consultants that developed deeper analysis of queries reported to them from first level).

5.2 Sources of basic information (for immediate answers) for the SMEs

Most part of the enquiries are simple information questions that must be immediately solved for a good performance of the help desk. The success of the help desk depends on the first level query throughput (the first level is the potential bottleneck). Our goal is to shorten the elapsed enquiry open-close time. That's why the availability of these sources of information is very important.

- **Basic information for immediate answers to specific queries:** Some good sources of information (e-commerce information databases and other different media like reports, web pages, help desk personnel training, etc.) must be available to the help desk staff in order to resolve some basic first level enquiries related to e-commerce and ICTs.
- **Basic information about services/solutions suppliers:** Some sources of information that are needed for this service should be:
 - E-commerce services/solutions suppliers database (remarkable ones or only those interested in being recorded in the database)
 - Supplier trade name
 - Contact person at supplier, post, telephone, address, e-mail address
 - Support Center personnel initially related to the supplier (if there is a specific dedicated person)
 - Date of first contact SME - Leveraging Center
 - Telephone, mail, etc. contacts between suppliers and support center.
 - Information gathered about contacts SME-suppliers, including comments

5.3 SMEs enquiries

5.3.1 Gathering SMEs profile information

All the information related to an enquiry must be recorded in order to manage and solve it. This information includes SME ticket opening when first query is submitted and other basic information from the SME could be obtained from course assistance questionnaires and other sources.

- SME profile info Content:
 - SME trade name/identification information (address, telephone, email...)
 - SME contact person
 - Support Center person responsible for contacting each specific user (if there is a specific one)
 - First contact date
 - Source of the SME's knowledge of the support center existence: internet, e-minder conferences or courses, e-minder publication, e-minder partners publications, mentioned by other users, etc.
 - SME category (main stream of businesses)

5.3.2 Logging enquiry information

Depending on the query scope and matter, it's possible to open a ticket for each SME query (the easiest and better solution) or maintain a unique ticket for all the queries of an SME. The choice depends on the number of queries/day:

Information content:

- SME trade name/identification.
- Status in ICT usage of the SMEs (state-of-the-art of the SME) will be used as a parameter for escalates an enquiry. If an SME is in an advanced state in ICT and e-commerce development, the enquiry won't have many possibilities of being solved in the first level. The enquiries shot by this profile of SMEs are more complicated and require an in-depth analysis for solving them.
- SME's person who is submitting the query and who will be the point of contact for further questions. Input information: name, e-mail, tlf, fax, address, etc.
- Support Center person responsible for the query management (this person will act as reference for subsequent questions)
- The Track-number will be a sequential number to identify the query. This identification may be unique for a certain media: telephone call, mail, web form, or unique for each SME.
- Query matter and complementary information based on SME requirements/expectations
- Different level previous analysis description:
 - At first level, the person attending the query makes a shallow analysis, which leads to two possible results: query answered or query submitted to the upper level.
 - At upper levels a more thorough, in-depth analysis takes place to evaluate and categorise the query
- Previous analysis determine the scope of each query:

- Simple request of information about e-commerce (possible immediate answer at first level, using available basic information)
- Expression of interest in e-commerce.
- Request of e-commerce services-solutions suppliers' information, or more complicated queries.

5.3.3 Enquiry priority mechanisms

The queries are prioritised based on variable issues depending on the LC objectives (expand e-commerce knowledge, achieve SME satisfaction, SME priority based on its interest in e-commerce, etc.). This must be done by the upper level of structure. A proposed priority system should be a based colour (red, orange and green query status) system. As part of the SME information, we could use this "coloured" system for identifying the priority of an enquiry.

5.3.4 Enquiry grouping

The queries are grouped in two types accordingly to the number of levels in the help desk.

First query group: Basic information and aims about e-commerce and ICT questions. Since the Galician SMEs have a low ICT development, this group of queries will be the larger.

Second query group: Advanced aims and questions group, like more in-depth e-commerce and general ICT questions.

5.3.5 Escalating enquiries

This process is done by the lower level of the structure. If the consultant feels that an enquiry is too much complicated or implies an in-depth analysis, the query is escalated to an analyst (with all the information and hints needed for restudy the enquiry by the analyst) but it depends on the priority setting up decided. All the query and SMEs information collected is passed to the analyst plus a set of incidences that may have occurred during the query evolution.

5.3.6 Closing enquiries

When an enquiry is solved a closing process begins to record some important information related to the solution or answer given to the SME. This information will be used for reports and some statistical information that will feedback the help desk.

- Change priority light to green
- Date of query closing and
- Query final results (SME involved in e-commerce issues, no information recorded, no changes from initial situation, etc.) The possible range of states will be defined by the detail level desired.

The queries assigned to the first level always result in a provisional closing. This situations are reviewed later by the monitoring staff that may change this state to finished.

5.3.7 Monitoring enquiries

Not only do we need to evaluate the current system, but as it grows, we need to continually evaluate it and identify the possible leaks. Some processes that our help desk application must handle for a good performance and monitoring are:

- Query state verification (periodically or when a special need arises)
- Query state analysis
- Event recording (incidences)
- Preventive/corrective actions execution

5.3.8 Enquiries reports

An important output for the help desk is the activity reports. They will help us in evaluating the good progress of the help desk. This feedback is a useful tool for detect and correct possible problems and watch if the goals still appropriate and if we have reached those goals.

The tasks developed during the query lifecycle must be recorded during the queries resolution cycle, including those actions carried out to answer questions, establish SME-suppliers contacts as well as events related with the query (date, comments, qualification of event importance):

- Support person that is responsible for the query resolution
- Query identification and links with previous queries
- Query record date
- Request means (telephone call, web form, e-mail, etc.)
- Date of request submission to other level (query escalation), person to whom the query is assigned (from query record date until date of submission to other level, the query is under the scope of the first-level staff).
- Date of query entrance at upper level.
- Date of interview: if an agreement is reached between the supplier and the SME to hold a meeting, the date of this event is recorded.

With this information recorded we can generate some interesting reports that will help us in improve the help desk activities and obtain useful information for dissemination issues.

5.4 Evaluating the objectives achievement

The help desk objectives achievement could be focused in:

- Analysis of the level of user expectation fulfilment: assessment of user satisfaction level, on the basis of its requirements, previous knowledge , expectation and the outcome of the whole query process.
- Analysis of level target achievement: it evaluates the set of support center objectives for each closed query and the contribution of the results to reach the Leveraging Center goals.

Support center activities will give useful information for subsequent analysis. Volume, variety and level of information recorded will depend on the desired analysis outcome.

Some ideas about useful information/parameters for evaluate our help desk:

Related to query characteristics:

- Volume of queries depending on mean (telephone, e-mail, etc.).
- Volume of queries depending on level (simple query, etc.).
- Number of queries depending on their final state/results: how many finish with SME-supplier contact, how many reach an agreement SME-supplier (at which level: catalogue design, virtual mall, payment on line, logistics, etc)
- Queries layout: by days, by weeks, by months, etc.
- Number of queries of each SME during SME-Support Center relationship

Related to Support Center performance (any level)

- Volume of SME's queries processed/recorded at each level and its results.
- Related to monitoring system performance.
- Preventive/corrective actions conducted at this level.

Related to suppliers

- SME-suppliers contacts established by the support center initiatives.
- Successful contacts that reach an agreement and information about their subject (web design, payment gateways, security issues, etc).
- Level of supplier satisfaction .

Related to users or Support Center "clients"

- Volume of SME
- Short and long-term evaluation of SME-support center relationship.
- SME compromise level with e-commerce reached level of SME satisfaction.

6. Conclusions

The help desk is not only a tool. Its aims try to go further than the expected “help tool” role. It could be said that the help desk carry out two functions with two different roles:

For the first one, the help desk is a tool for guiding and helping the regional SMEs in e-commerce related issues. The SMEs have a lot of initiatives, aims, questions, doubts ... etc and they haven't been answered yet. The SMEs could use the Leveraging Centre as a source of information, that will give them answers and a good startup guide to integrate the e-commerce in its business processes. Moreover, the help desk will link the demand with the offer in e-commerce and IT for a better development of the regions and fill the gap between the most and least developed regions in Europe.

The second role is about the information generated during the “help” process. All this useful information (recorded by the help desk) could be used for taking a picture of the state-of-the-art in e-commerce and IT for the replication of the experience. This information could feedback other Leveraging Centre areas (Communication, Observatory and Training) as well as other sinergies with projects in different frameworks (INTERREG and others). Also this information should complement the one obtained in the surveys.

With this role, the evolution and development in e-commerce and IT is improved, because all the new needs of the SMEs will be detected by the help desk and surveys. All this information needs an in-depth analysis in order to obtain conclusions and generate the right actions and campaigns.

ANEX 1 Flow diagrams

General flow of an enquiry

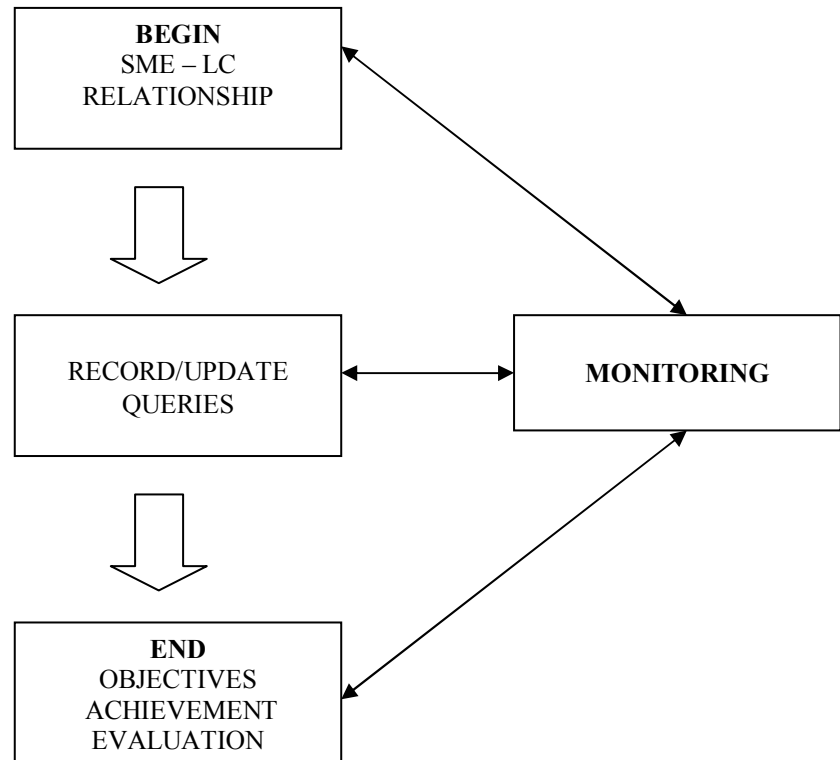


Figure 2: General help desk flow

Leveraging centre relationship flow

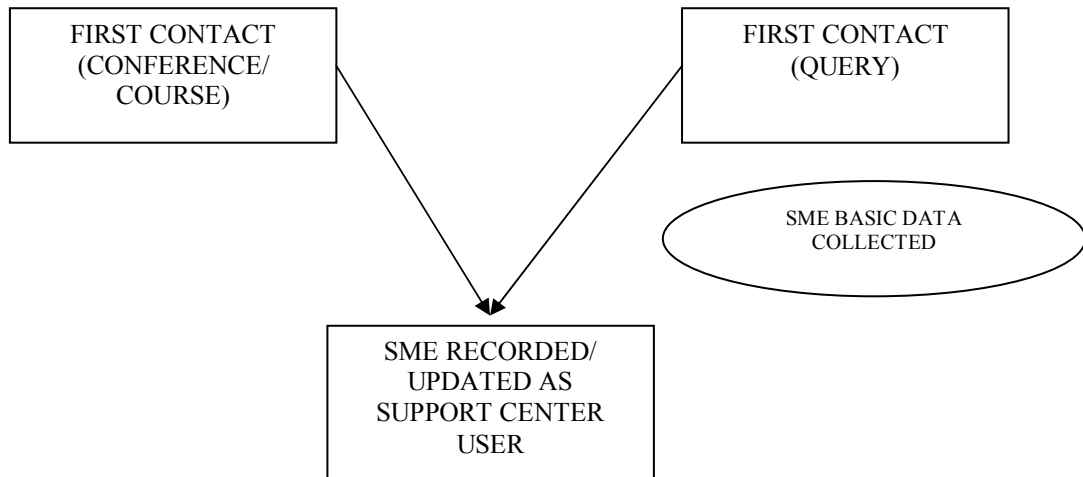


Figure 3: Leveraging centre relationship flow

Enquiry logging, priority, grouping and closing flow

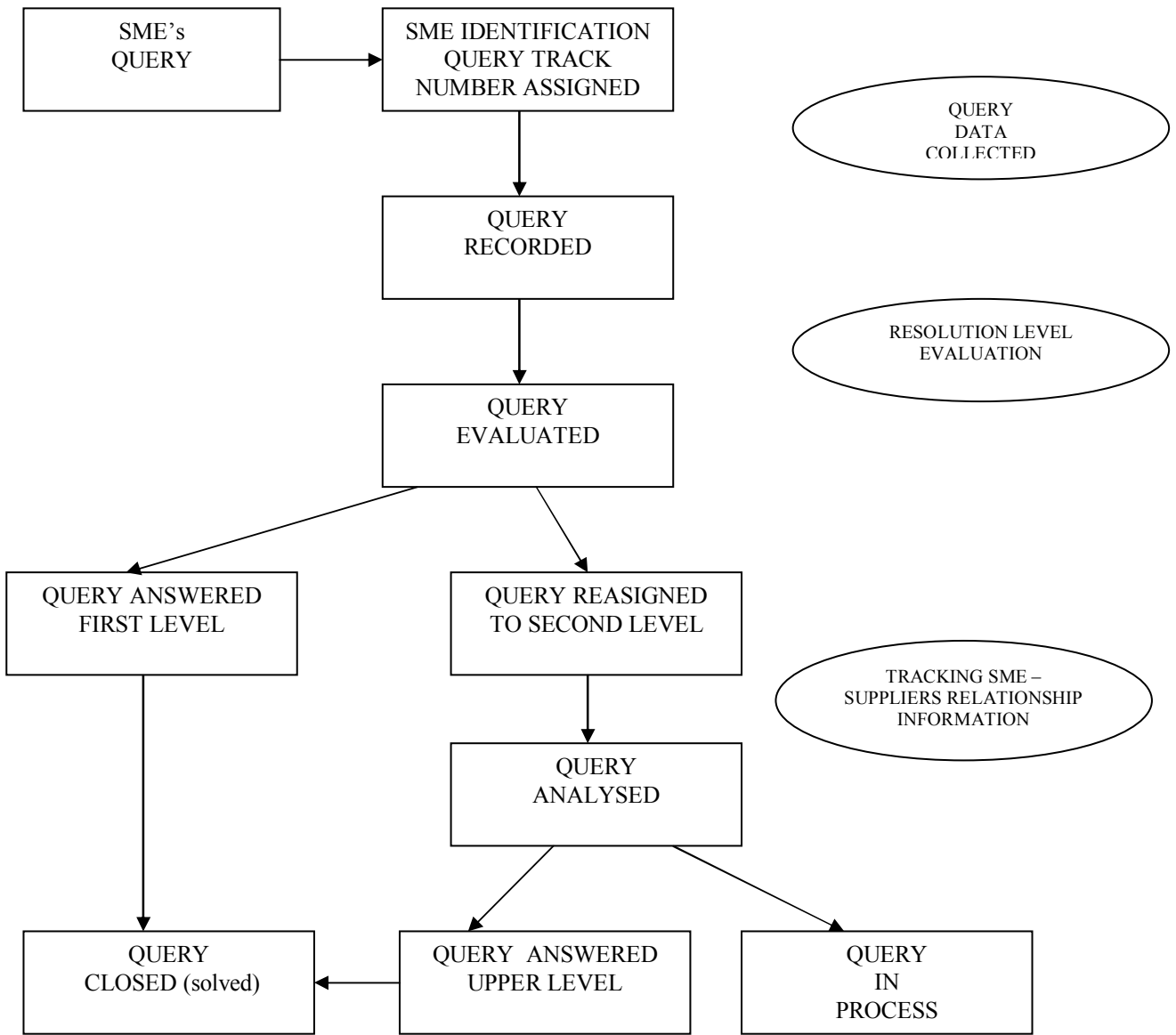


Figure 4: Enquiry solving flow

Enquiry monitoring (incidences) flow

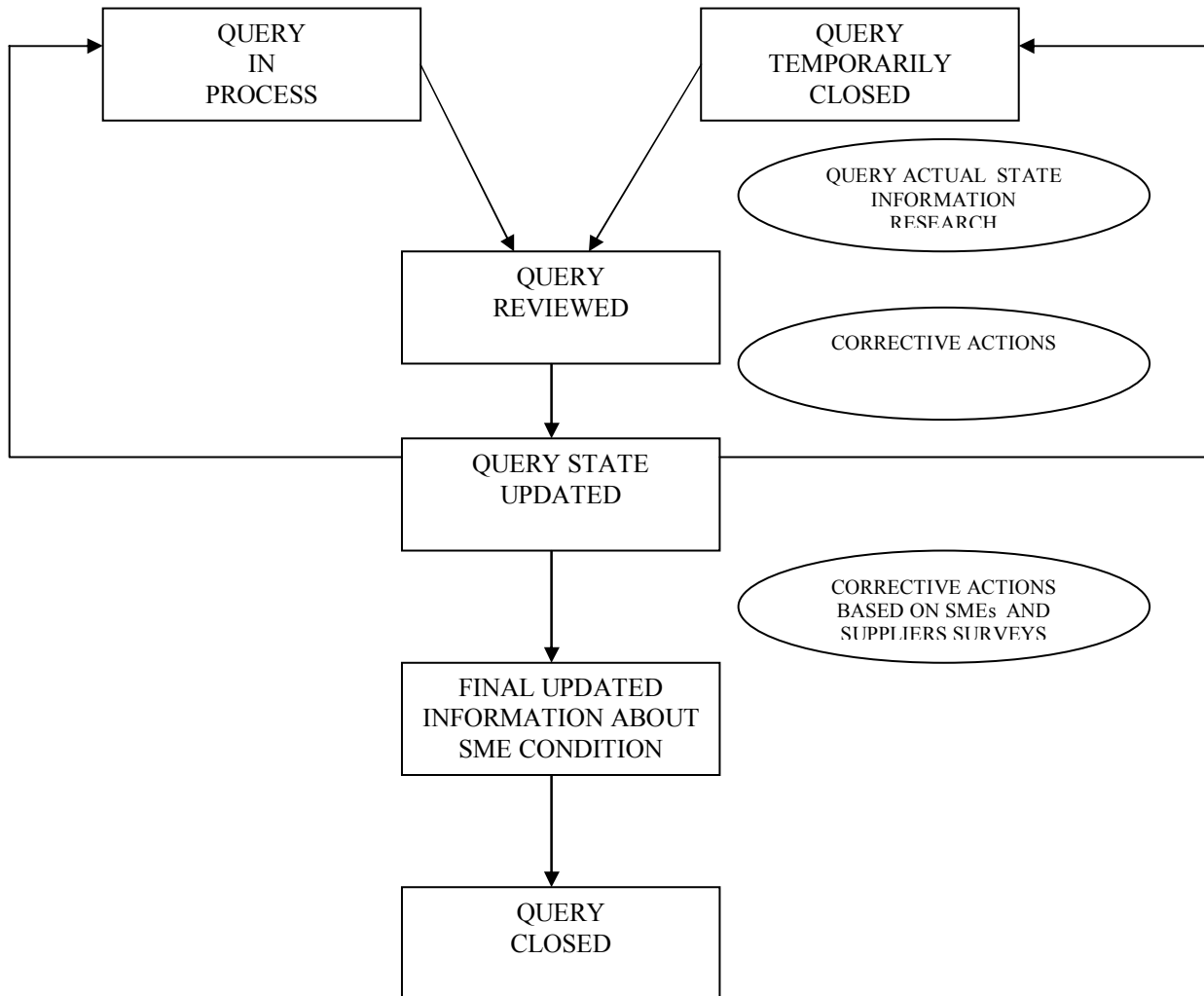


Figure 5: Query monitoring and updating flow

Level of target achievement analysis flow

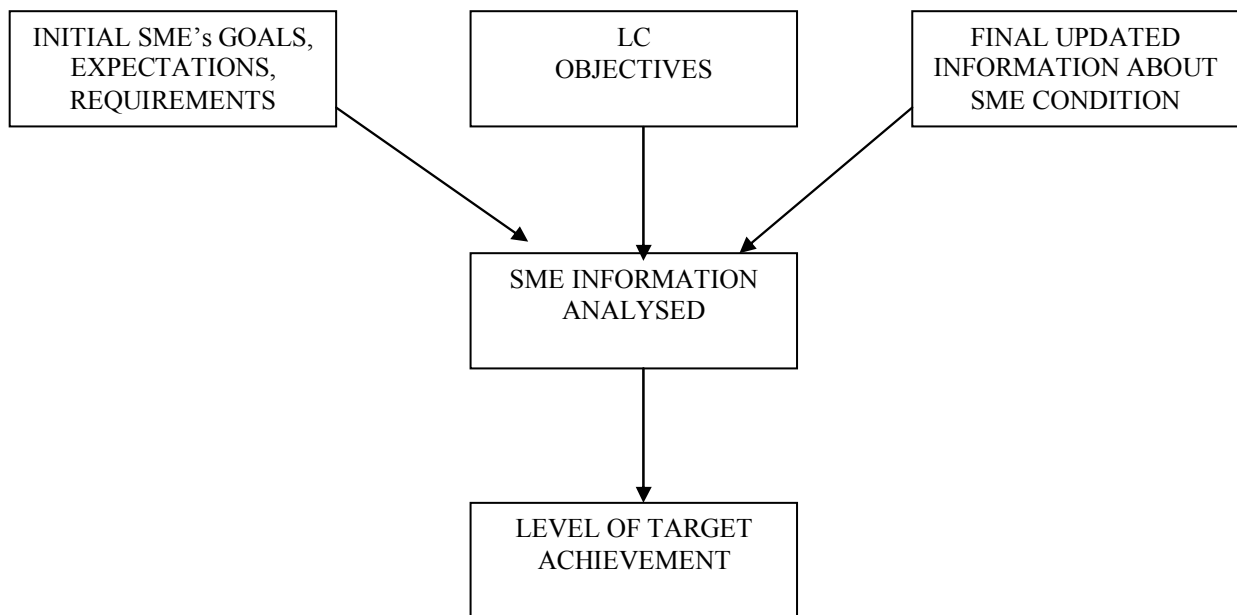


Figure 6: Level of target achievement analysis flow