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Customer Service at PCC -- Then and Now

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Two years ago, the customer services group within the Information Technology Services department was in a shambles. The staff were overworked, morale was at an all time low, and the customers were seldom happy with the ITS department. PCC hired a new manager for Client Support Services who had a strong vision of what should be. He had a vision of a high performance, self-directed, customer focused, Client Support Services team. Today the staff is energized and the customers are our partners. It did not require lots of money, smoke or mirrors. It did require a commitment to change and a redirection of attention from the department to the customer. This presentation will explore what we found to be the key success factors for this challenging project.
“Delivering Knock Your Socks Off Service means creating a memorable experience for every customer. It means meeting expectations and satisfying need -- and in such a way that you’re seen as easy to do business with.” Anderson, Zemke (1991, p. 1)

Two years ago, the Client Support Services group within the Information Technology Services (ITS) department was in a shambles. The staff was overworked and morale was at an all time low. Their workload had increased drastically since everyone at the college was buying a desktop computer and trying to learn new software. The customers were seldom happy with the ITS department. They often had to wait too long to get help and the work was often not satisfactory.

The college was poised to leap forward with new administrative information systems, new host computers, and new networks. The impact on the staff and faculty would be significant. To be successful, we had to have a solid customer support organization. Something had to be done quickly.

The Environment

Portland Community College is the largest institution of higher learning in the state, serving close to 900,000 residents in a five-county, 1,500 square mile area in northwest Oregon. PCC enrolls more than 82,000 students annually. Courses are offered at six primary locations. Three regional campuses and three smaller centers are disbursed throughout the Portland metropolitan area. In addition to the six main campuses and centers, there are smaller PCC offices at many other locations; in office buildings and at customer sites. Most of the college staff who work at these locations are supported by the Client Support Services department.

There are approximately 3,000 nodes on our metropolitan area network. Redundant leased lines connect each campus and center. We use the Banner system from SCT as our administrative information system. PCC is one of the largest Banner sites in the world.

The Information Technology Services department supports data and voice networks and administrative information systems, and provides general support services for faculty and staff. Instructional support for faculty and students is decentralized. Each campus and department independently manages their own instructional computing activities.

![Image of ITS Organization](Fig. 1: ITS Organization)
The Way it Used to be

“IS managers typically try to improve low satisfaction ratings by asking what customers want, and of course, their customers tell them. Based on their understanding of what is possible, customers may "require" anything from universal data access to 99.9 percent availability with subsecond response. Customer satisfaction, however, is a direct function of the perception of value delivered, which is not measured in absolute values, but is relative to an expected outcome.” Gartner Group (1996)

By industry standards, we should have been in good shape. Our ratio of support staff to the customer base was as high as the national average in higher education. We had seven Client Support Services specialists who worked on our customers’ problems. There were five software technicians and two hardware technicians. The software people traveled throughout the district and helped staff and faculty when they had problems with the installation or use of desktop software. The hardware technicians built and repaired PC’s and peripheral equipment.

The staff worked very hard to meet their customers’ needs. Customers would often call or corner a staff member in the hall with an “urgent” problem. When that occurred, they usually gave their customer immediate attention. Of course, some customers were blessed with better service than others because of their position in the organization or because of friendships they had with certain ITS staff. There were no clear guidelines or expectations for this service, but most college employees knew who to call when they had a problem. They also learned that they should identify all problems as urgent or they would never receive attention. Even then, they often had to wait and they became very skilled at “power whining” to receive any service at all. Over time, they became more and more frustrated.

The ITS staff knew they had a problem. They were certainly aware that they had a great deal of work to do and that they were having difficulty in getting it done in a timely fashion. Of course, many of their customers just refused to learn enough about their computer. In fact, some did not even know very much about DOS. There was simply too much work for the number of available staff. They felt that with more support staff things would get better.

There were no formal operating procedures for technical services. There was also very minimal staff training. Support staff were expected to learn what they needed to know on their own. After all, they all had manuals. Of course, as busy as they were attending to customer problems, they never had time to read the manuals. The staff did not think that operating procedures were very important. It was pretty simple, after all. If a customer needed help, they let you know and you helped them. Why were procedures necessary?

From the customer’s perspective, there was very little trust of the ITS staff. ITS seldom did what they promised, and you could not rely on them to act in the best interests of the individual customer. Not only didn’t the ITS staff understand or appreciate what their customers needed,
they often did not have enough technical skills to be of assistance. The customers soon learned who to call. They certainly did not want to wind up with someone who couldn’t help them. Of course, the few Client Support Services staff who were skilled were in high demand. It sometimes helped to “lie in wait” for them as they emerged from a meeting or from the rest room. If you could physically capture them, you had a better chance of getting them to take care of the problem.

Morale among the Client Support Services staff was very low. They worked extremely hard and nobody seemed to notice. There was far too much work and not enough time to get it all done. Each day was spent in a reactive mode, dealing with the crisis of the day. The staff felt that their customers just did not appreciate all that they did. The harder they worked, the more frustrated the users became. Why couldn’t they see that ITS was just trying to help?

**A New Manager, a New Vision**

The ITS director at that time felt that the department needed a complete overhaul. The Client Support Services Manager was not able to accomplish such a major change. She was moved to another position and a search was initiated to find a new manager who had the right vision and skills to lead the Client Support Services team. PCC needed someone who understood the technology, had a commitment to high quality customer services, and had the business skills to re-engineer the internal procedures. Gary Eaton was selected as the new manager. Gary had worked as a member of the Client Support Services group in the past, so he knew most of the staff and many of our customers. He seemed to have the correct vision and the necessary skills to achieve his goals.

What the rest of the college saw as a problem, Gary viewed as a challenge and an opportunity. He felt that we had the right resources. However, the challenge was to turn them into a solid, high performance team. Since the current situation was so bad, there was little to lose by trying something new. There was also a lot of support for change among ITS management and throughout the college. At about the same time Gary was hired, PCC embarked on an institutional Total Quality Management (TQM) project. The timing was great.

**Change Happened Quickly**

“When teams work, they represent the best proven way to convert embryonic visions and values into consistent action patterns because they rely on people working together.” Katzenbach, Smith (1993, p. 19)

To begin with, Gary started working closely with his staff. His goal was to provide them with technical and decision making skills to be able to effectively meet the needs of their customers. He also wanted them to depend on and support each other. He knew that through teamwork and communication, they could strengthen their individual skills to the benefit of the customer. He had to build trust between him and his staff as soon as possible. The staff did not trust
management, but building that trust was the critical first step. The relationships among the staff and between them and the manager were extremely important and would require hard work on everyone’s part.

They also had to build trust with their customers. The Client Support Services team started asking people what they needed. Our customers were surprised. They had never been asked what they wanted before, at least not from anyone who listened. Prior to this, the customers could not depend on the ITS staff to listen and take action based on their expressed needs. It was very important to make procedural changes based on the desires of our customers in order to build the trust that was necessary to achieve the vision.

The redesign process took several forms. We remodeled the office spaces and purchased new furniture. In the past, all members of the team took a turn working on the Help Desk. However, not all of them had the necessary skills to be effective in this position. Gary permanently assigned two members of the staff to work on the Help Desk. They were given the necessary training to build communications skills and problem solving skills. Gradually, each member of the team discovered a new way to think about their job.

We developed internal procedures to allow the staff to log and track each request for service, large or small. Help Desk software was evaluated. A decision was made to develop a system in-house using Microsoft Access. We felt that we could satisfy 80% of our needs very quickly and at a very low cost. We designed the system to allow the Help Desk staff to log calls, code them based on source and type, and assign them to an ITS staff member, if necessary. Each month, ITS management received reports and charts that showed the volume of activity by time period and by type of request. In addition, the Client Support Services team tracked average time to completion for requests. They developed team goals to reduce the time to completion and used it as one measure of success.

We also worked to manage the expectations of our customers. The core ITS services were defined and promoted. We not only advertised the services we provide, we also clearly identified many services that we do not provide. It was important for the college staff to understand the “business” that Information Technology Services was in. The Client Support Services team also learned how to effectively say “no”. It is often possible to refuse a request for service, yet make the customer understand the reasons for turning them away and provide them with other options when possible. “You can’t always tell people what they want to hear, but you can tell them in such a way that they will want to listen.” Lebauf (1989, p.141-2).

There had been no standards for desktop hardware and software. Individual departments bought whatever they wanted. We considered setting standards for desktop hardware and software. If there were standards, the ITS staff could focus their skill building and support services on just a few products. An RFP was issued for the purchase of standard desktop equipment. The college was going to stop building their own computers. Instead of selecting only one computer vendor, three were selected. The selection committee had reached a compromise. The end user would
have a choice among the three brands, yet the support staff would only have to worry about three types, and they were all reliable, supportable systems.

An RFP was also issued for hardware repair. The Client Support staff would diagnose problems, then contact the maintenance vendor if there were hardware problems. The repair person would fix or replace the defective component and would bill the user department directly. Our customers were nervous about relying on an outside company for this service, but the trust that had developed between ITS and the college community paid off. They agreed to give it a try. Finally, ITS was completely out of the hardware business.

Several processes were used to measure the quality of the services and the success of the changes. We mailed customer surveys to all college staff and a gap analysis was done that measured the difference between the importance and the perceived effectiveness of each primary group of services. The results of our first customer survey illustrated some significant gaps, but this provided us with important information to improve our services. It also served as a baseline against which we could measure our progress in future surveys. Our support specialists also left mail-in surveys on customers’ desks when work was done and an electronic suggestion box was started. Just asking our customers how they felt about our services was effective in building trust. But, communicating the results of the surveys and making changes to our services on that basis really made the users our partners. The “them versus us” attitude slowly melted.

We made training of the support team a high priority. Seminars and workshops were found that addressed the technical environment -- MS Windows, MS Office, networking concepts, Macintoshes, etc. In addition, there were workshops on problem solving techniques. As part of the institutional efforts to encourage Total Quality Management, the staff received in-depth training on the fundamental concepts of Total Quality Management and Continuous Quality Improvement. Every Friday, the support staff leave their remote locations and congregate at one of the campuses for a full morning of meetings and workshops. These morning meetings consist of team communication, planning, and skill building activities. Often a member of the support team or someone else from the ITS staff provides a short course on a technical subject. These weekly meetings improve individual skills and knowledge, but, more importantly, they bring the people together and strengthen the team. Gradually, each person has learned to depend on his/her team members for support.

In addition to skills and knowledge, the staff received new technology to help them. They were given pagers, laptop computers, and cellular phones. Since they were usually on the move, it was important to be able to communicate easily and to work from various locations. Recognizing their need for mobile technology also empowered them and reinforced the idea that they were trusted professionals whose work was valued.

There were also unexpected benefits to the rest of the ITS staff. We were all able to be more effective because of the front-line efforts of the Client Support team. The college community viewed the entire ITS department more favorably. The great public relations work paid off for
everyone. There was more support of and appreciation for the systems development and technical support work that we did behind the scenes.

In order to build a high performance, self-managed team, it was important to recruit and retain the right people. We needed people with that important balance of technical abilities and interpersonal skills. Most members of the existing staff were committed to the idea of customer service, but they did not work well as a team. We encouraged staff participation in team decisions and we urged individuals to make decisions on behalf of their customers and commit departmental resources if necessary. It was important to have frequent and effective communication in all directions.

Early on, the group decided that they wanted their own team identity. They decided to call themselves the ComPro Team. A logo was designed, and shirts and smocks were ordered. They wanted the college staff to recognize them as a member of the new professional support team. The ComPro Team took pride in their new identity.

The roles and responsibilities of the Client Support Services team changed relative to other groups in ITS. They developed closer alliances with the technical support group and the systems development team. In some cases, their efforts in better determining their customers’ needs resulted in rearranging responsibilities for certain tasks. For example, in order to be more responsive to their customers, the Client Support Services group took over certain tasks that had previously belonged to the network support people.

Gary experimented with giving his staff more and more authority and responsibility. When they had a vacant position, they agreed to hire a replacement themselves. The Help Desk staff and the support specialists comprised a search committee and conducted all the interviews themselves. It was important to them to select a person who had the right knowledge and commitment and could function well as a member of the team. Gary was careful to provide support, yet encourage them to make their own decision. The experimental process was very successful and we will use it again.

We also provided the team with a small budget that they can spend on software, supplies, or training materials. This allows them to react more quickly to a situation and solve it effectively, even if it costs money. Group decisions about whom to hire or how to spend scarce resources strengthen their reliance on each other and make them more effective as a team.

The Situation Today

We are still under-staffed. There are more requests for technical support than we can easily handle. We are, in fact, victims of our own success. The number of calls at the Help Desk has increased from 300 to 2,000 per month. Last year, we logged over 17,000 requests for service. PCC’s volume and type of Help Desk requests are illustrated in the Appendix.
With continued rapid change throughout the college, the demand for technical support continues to increase. There is pressure from many directions. PCC continues to deploy new technology and upgrade existing systems. In the past three years, we have installed new networks and we are upgrading the Banner software to a client/server version. We are also migrating to a new electronic mail system. The Internet and the college intranet have also changed the technical landscape. We continue to be under great pressure to meet the demands of our customers. But without the changes that we made, we would have been buried long ago.

We have better tools to support our activities. The Help Desk has access to management software for our host computers and for the network. This allows them to diagnose problems more quickly and assign them to the proper support staff. The support specialists also have new software diagnosis tools for PC’s. An investment in technology is important to help Client Support Services to be more efficient.

The level of trust among the staff and between them and their customers has improved considerably. There is also a great deal of collaboration with other college staff. The support specialists are assigned to a specific campus or center and they have forged strong working relationships with the faculty and instructional support staff at their campus. They help each other with technical problems when necessary. Each specialist is able to prioritize their work based on the situation at their campus. They are responsible to both Gary and the executive dean at that campus for the work they do.

The ITS managers meet regularly with groups of campus and division managers and deans. In these meetings, we remind them who we are and explain our services. We then solicit comments and suggestions regarding the quality of our services. Throughout the past two years, we have seen a trend toward more partnership discussions in these meetings, and less complaining and blaming. The college community understands that ITS is usually acting in their best interests and that we should work together to improve conditions.

Overall, the Client Support Services staff are much happier with their work. They are able to enjoy the fruits of their labor and they feel good about the positive feedback they receive from their customers. Even though the work is hard and the pressure continues, they feel that they are able to make a positive difference in the way people at PCC use technology.

**Our Goals for the Future**

We need more software tools to allow the staff to be more productive. We know that the demands for technical support will continue to increase. By finding and deploying networked tools we hope to be able to leverage the staff’s expertise to be able to take care of requests more quickly. The Help Desk will be able to perform more direct services immediately without assigning work to a support specialist.
We will probably have to add staff to the Client Support Services team. Even though we are far more productive than we were, the workload continues to increase at a high rate. In the past year, we brought two new PCC sites on-line and expanded two of the campuses. No additional funding was available for technical support so we had to reshuffle the campus assignments in order to support the needs at these new locations. We are trying to add an additional person to the Help Desk. There are only two full-time Help Desk professionals and an administrative assistant who helps at peak times.

We are piloting the use of Service Level Agreements for certain departments and certain services. Service Level Agreements are typically used when contracting with vendors for professional services. They can also be used with any service that involves a provider and a customer. We use agreements for non-standard situations where it is important to clearly describe the expectations for each party. They usually define the services that our department provides and what we expect the customer to do in order to receive the service.

We hope to increase the number of options our customers have to receive assistance. The Help Desk is very popular and we want to enhance it and increase the level of support. In addition, we publish documentation, policies, and frequently asked questions on our intranet server. This involves altering our customers’ behavior so they look to the web first before calling the Help Desk. We are also trying to encourage people to form good old fashioned user groups. Through encouragement and incentives we want horizontal support systems to evolve in addition to the centrally provided support. We do not have the staff to teach classes, but we sometimes hire faculty to teach classes for the college staff on subjects for which we receive a high number of support calls. Our customers will be better off if they can improve their skills by a variety of methods.

We are considering further defining our ITS services. We might define different levels of service for different products. For example, certain platforms and software such as Windows 95 and MS Office might be at a high level and receive very thorough support. These are products that are popular and that we want to become standards. We might, for example, provide less support to Macintosh and/or WordPerfect users. By defining support levels, we could focus our training and procedures to fewer items, and we could more quickly move toward better institutional standards. At PCC, it is very difficult to tell our customers that they cannot use a particular product, but we can certainly provide incentives for them.

We plan to allow our customers to query our Help Desk database. By being able to see the Client Support requests, our customers will be able to determine the status of their projects. They will not have to call the Help Desk to check on the status of a request. They will be able to query it themselves. We will probably accomplish this by creating a web page query on our Intranet server that will issue calls to the database.

We might also involve the Client Support Services staff more in budgeting and purchasing activities. They can be more effective if we allow them to help decide how the departmental
funds are allocated. They should be allowed, for example, to lobby for certain projects that would improve conditions for the customers at their campus or center. We intend to continue the practice of peer hiring that was so successful last year. Team building activities will also continue to be a high priority. The Client Support Services staff has a planning retreat twice a year, usually at one of their houses. This has proven to be very useful and we will continue the practice.

We intend to strengthen the new processes that have been so successful over the past two years. Maintaining high quality customer support services requires constant attention. We will continue to listen to our customers and improve our processes accordingly. We will monitor our progress and test our systems. And the cycle of listening, testing, and improving will continue forever.

Summary

We took some risks and experimented with changes to improve the conditions at Portland Community College. The keys to our success were the following:

- Build **trust** -- within the support team, with management, and with customers
- **Ask** customers what they need, **listen** carefully, and do what you can to address their needs
- **Remodel**, **redesign**, and **re-engineer** -- facilities, processes, standards, and core services
- **Manage customer expectations**. Through careful marketing and communications, help them understand what you are able to do and what they can do to help.
- Continuously **measure** the quality of the services and make necessary adjustments
- Provide the staff with **training** and as many technology **tools** as possible. The idea is to work smarter, not harder.
- Make sure you have the **right people** in the right job. Help Desk positions and support staff need very specialized communication, problem solving, and technical skills.

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