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The Help Desk Is On The Critical Path For Pandemic/Disaster Recovery

Oft-Overlooked Group Is Key To Business Continuity

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EXECUTIVE SUMMARY

The designation of the H1N1 flu virus as a pandemic by the World Health Organization (WHO) should, once again, prompt organizations to revisit their business continuity planning processes. However, recent conversations with Forrester clients reveal a potential gap in this planning — the role of the help desk or service desk in business continuity planning. To quickly recover from a major external event that interrupts normal business, be sure to include the help desk on the list of critical first responders with resources and tools dedicated to the rapid reprovisioning of what will inevitably become a critical resource for displaced business employees.

TECHNICAL SUPPORT ORGANIZATION MUST BE ON LIST OF "FIRST RESPONDERS"

When business users are faced with any technical issues that prevent them from successfully completing a business task they will (hopefully) make their first call to a service desk or other technical support organization. It therefore makes sense that the support organization must be at the forefront for business continuity planning and have the structure, processes, and tools in place to ensure that:

- **Requisite staff can be located quickly.** A major business continuity event, whether pandemic-induced or otherwise, will likely require the mobilization of more than a skeleton on-call group. Up-to-date contact information for all staff must be maintained and be accessible by support management from remote locations.

- **Notifications to support staff take place immediately.** Mobilizing the support organization to react to the event must take place as soon as possible. The quicker that the support organization is capable of supporting what is likely to be a growing number of end user requests, the quicker the organization is likely to be able to resume key business functions. Notification processes and tools, whether automated or manual, must be tested in advance to provide an indication of their effectiveness. Knowing what percentage of technicians are able to respond to an incident will facilitate planning.

- **Support staffs are capable of providing support to end users.** Key tools to respond quickly must be brought online as quickly as possible. These include remote control, incident and problem tracking, emergency communication and notifications, plus any knowledge bases required to remediate the technical issues, limited availability of key business systems, and changing technical architectures.

- **Knowledge bases are populated with appropriate content.** If business continuity planning includes changes to end user access methods, changes to security or server location settings, or any other systemic changes that might affect end users, the likely workarounds for these issues should be pre-populated in a support knowledgebase. Ideally, this information will be accessible by the end users themselves. However, as a minimum, it must be both available and accessible by those providing technical support.

- **Status changes are communicated to support personnel as information becomes available.** Most business resumption plans include the sequential resumption of key business services. Informing the support organization of the current state of the business infrastructure, expected future actions, and unexpected issues that arise will allow them to convey this information to expectant business users, reducing uncertainty and allowing for better business planning.

Distributed Organizations Not Immune To Continuity Planning

Organizations with multiple support locations that provide "follow-the-sun" support may be in a better starting position for business resumption planning than one with a single, centralized support organization. Staff may be available at a well-equipped center away from the event, providing a basic support infrastructure. However, a large-scale event can stress such an organization and existing processes. Distributed support organizations should ensure that they can:

- **Scale up to meet needs.** Most organizations are staffed to meet local needs during local business hours plus a minimal support demand from other geographies. The support demands from a continuity event will likely strain the normal staff, and plans to supplement them must be in place.

- **Access user information from different geographies.** The segregation of user information and configuration data that may be acceptable if a remote support group is only providing after-hours support to a business user may be unacceptable if that same group must now perform the complete suite of support services.

- **Perform level-two and level-three support services remotely.** In a typical follow-the-sun support model, the remote support group may only provide level-one support activities for a remote user after hours, routing level two and level three issues back to an "on call" support person in the user's native geography. In the case of a major event, processes (and the supporting tools), should be in place to allow for this deeper level of support. Access across domains to key systems and permissions to change system security and configuration settings are two areas that are likely to need to be addressed.

- **Tie dispersed support resources to the support organization.** As local support personnel come online, they should be integrated into the remote support organization — at least until there are sufficient resources available to allow for the re-establishment of the local group. Tools, communications, and queues must be capable of supporting these new "temporary" members not located within the same facility — or potentially the same geography.

Although there is no guarantee that an organization with such processes and systems in place will be able to recover seamlessly from a business continuity event, forethought and preplanning will allow it to address some of the key issues likely to be faced during such events.

RECOMMENDATIONS

REVIEW CONTINUITY PLANS FROM THE BUSINESS USER SIDE

Business continuity plans that center around the technical aspects of bringing systems and infrastructure back on line may be missing a key component — what the business users will face when they try to access key business technology services. Specifically:

- **Treat the support organization as a first responder to an event.** Additionally, as changes occur, notifications are also sent to the support groups as a conduit to business users.
- **Ensure that a support organization is accessible to business users in need.** Phones are transferred, staff is available, and key tools and processes are in place.
- **Look to SaaS-based offerings to complement existing capabilities.** Serious planning can and likely should include the possibility of complementing current premise-based tools that may not be available in the early stages of an event with service-based offerings in key areas such as outbound notifications systems, remote control tools, and knowledge management. A small investment to set up a few licenses in advance of an event can likely be scaled rapidly, should the need arise.