Chapter19: Implement a Shift-Left Support Strategy Worksheet

In this worksheet, we will be walking through the steps to implement a shift-left support strategy in your department.

Step 1 – Gather the ticket data.

The first step is to define the universe of incident or service request tickets that were not able to be solved or provisioned by the Help Desk. This means we want to identify the tickets that were escalated to desktop support, IT engineers, developers, and vendors. Ideally, you want to gather at least six months' worth of ticket data.

Step 2 – Filter and group the ticket data.

With at least six months of ticket data collected, we will want to filter out tickets resolved on the first contact. We then want to group the ticket data by categories. The idea is to understand what incidents and service requests are being frequently requested by customers grouped by type.

Step 3 – Sort by escalation groups.

At this point, we have gathered ticket data, filtered out the tickets resolved on the first contact, and grouped the tickets by categories. Now we want to sort the ticket data by the escalation group that solved the incident or provisioned the request. Identifying the escalation group will help us document and create a process for the Help Desk to take on this activity.

Step 4 – Prioritize the best shift-left candidates

Not every incident or service request will be a good initial candidate to shift left. With hundreds of non-FCR ticket categorized tickets, it's best to start with the groups with the best probability of success.

- It is good to start with candidates with a high volume of occurrences.
- Good candidates to also start with are candidates with little or no additional access rights needed by the Help Desk agent to process.
- Candidates that are not overly complex and can have a step-by-step process made are good candidates.

Step 5 - Meet with the escalation group managers

Now that you analyzed your ticket data and have a good list of shift-left candidates, it's time to meet with the escalation group managers. The goal of the meeting is to review the shift-left candidates with the manager of the escalation group that was able to solve the incident or request. The conversation should focus on the following.

- Review the shift-left candidate and determine if the Help Desk can handle these issues.
- Determine what additional access the Help Desk would need to handle these issues.
- Decide on which shift-left candidates will move to the Help Desk.
- Identify, with the escalation group managers, what resources are available to assist with transitioning the shift-left candidates to the Help Desk.

Step 6 – Implement the shift-left plan

Now that you have determined which shift-left candidates are moving to the Help Desk, you must prepare the Help Desk team for the new work. If you were able to obtain transition resources from the escalation group, they would be able to identify all the transition steps. In general, here are the most common transition steps.

- Identify and provide access to Help Desk staff to perform the shift-left work.
- Create a training plan and train the Help Desk staff on the shift-left work.
- Create the necessary knowledge articles, ticket categories, and escalation paths in the ticket application and knowledgebase to support this shift-left work.
- Determine a cut-over date and time. Once cut over, monitor the success and watch for issues.