Chapter 24: Total Contact Ownership worksheet

This Help Desk improvement checklist worksheet is intended to be used in conjunction with the related chapter in the [Help Desk Management Book by Wayne Schlicht](#).

The keys to successfully implementing Total Contact Ownership are common sense and straightforward.

Step 1 – Create and document the total contact ownership process.

Ensure you incorporate the total contact ownership best practices outlined in this chapter are reflected in your incident management, service request management, customer handling, and ticket handling procedures.

Step 2 – Train the staff on the total contact ownership process.

Once the total contact ownership process has been created and documented, then the Help Desk agents need to be trained. Help Desk agent training on the new process is critical to the overall success. The Help Desk agents and the escalation groups must receive proper training and set expectations for the process. Use the training and development best practices identified in the corresponding chapter. Remember the total contact ownership best practices cover many areas. These areas include the following.

- ticket escalation
- customer updates
- overall agent ticket workload
- engineer support notes
- customer approvals for closure
- creating knowledge articles for new resolution steps.

Step 3 – Communicate with the customer about the total contact ownership process.

Communicating the new total contact ownership process to customers is also critical to the overall success. The customers should be provided an overview of the process. They also should understand that there will be an owner of their issue identified and tracking the issue to closure.

Step 4 – Provide reporting on the total contact ownership status.

There are a lot of different reports that can be generated related to total contact ownership. Some of the important reports are the following.

- Total open tickets

- Tickets opened by the customer
- Tickets opened by Help Desk agent owner
- First Contact Resolution rates. The FCR rates should be improving as total contact ownership matures.

Step 5 – Meet with the customer on the total contact ownership SLAs.

The customer is kept up to date with the entire resolution process and status updates from the Help Desk agent who owns the ticket. Many departments and customer groups may have Service Level Agreements (SLA)s setup with the Help Desk. These Service Level Agreements with the Help Desk and escalation group have a pre-negotiated timeframe to resolve the incident reported by the customer. During the meetings, some of the total contact ownership reports created in the previous step may be helpful to share.