Halp

Starting your request management journey

A survey of over 1,000 professionals in the request management space

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Start here: Charting your request management course

The road to managing requests never did run smooth. Whether you're part of a large, established IT org, or building out a new internal employee experience function at a fast growing startup, discerning the best tools and practices for your support function can be challenging.

This is especially true in an ever-evolving business landscape impacted by global pandemics and changing workplace technology. It's hard to know where to begin, and you can't truly start your journey until you know where exactly you are, and where you're headed.

To better help teams find their way when building an internal support function, we surveyed over 1,000 professionals who manage requests as part of their day-to-day work to gauge common industry challenges and how they overcome them. Through this survey, we were able to pinpoint three distinct maturity levels – **low, medium, and high** – along with their defining characteristics when it comes to technology usage, goals, and practices.

In the pages that follow, we've outlined these findings with the goal of giving other teams a way to benchmark their own progress and hone in on their destination using real industry data. Use this guidebook to get a lay of the land, chart your route, and learn from the best practices of your peers along the way.
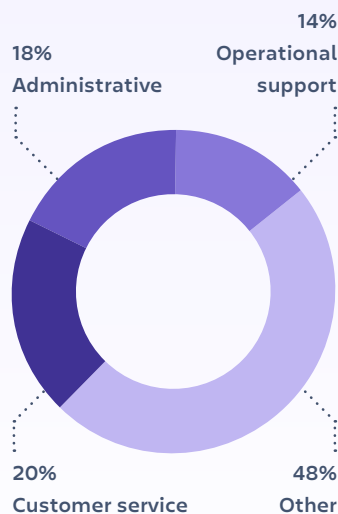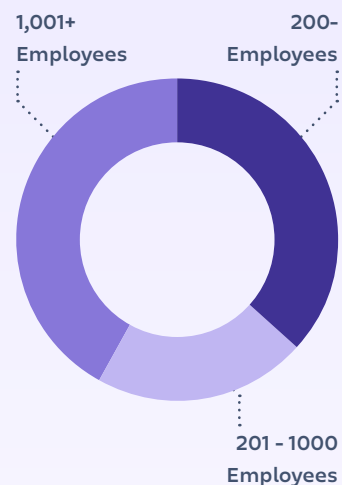
Who's along for the request management ride?

Getting a lay of the land: Survey demographics and maturity model methodology

Service management and ticketing tools aren't just for big, corporate IT teams anymore. Every team – from people ops to sales, from SMBs to giant enterprises – is looking for ways to operationalize their internal and external support function.

Company size

Our survey included 1,005 respondents from four primarily English speaking countries – Canada, USA, UK, and Australia. Roughly a third of the sample (36%) currently work in enterprise-sized companies (1000+ employees). The remainder work in small-medium businesses (SMBs) and are divided between small companies with less than 200 employees (43%) and those 201-1000 employees (21%).

1,001+ Employees

200- Employees

201 - 1000 Employees

14% Operational support

18% Administrative

20% Customer service

48% Other

Industry and role breakdown

The sample skews towards industries in which customer service is a core component of their business with 16% of the sample working in retail, 11% in healthcare, 9% in financial services, and 8% in government. Other top represented industries included education, manufacturing, hospitality, technology, legal and professional services.

Unsurprisingly, the most common request-oriented roles tend toward customer service reps (20%), administrative teams (18%), and operational support (14%).

The request management maturity spectrum

It would be easy to assume that categorizing request management maturity correlates directly to a one-size-fits-all set of traits. However, that isn't necessarily the case.

Low maturity

Medium maturity
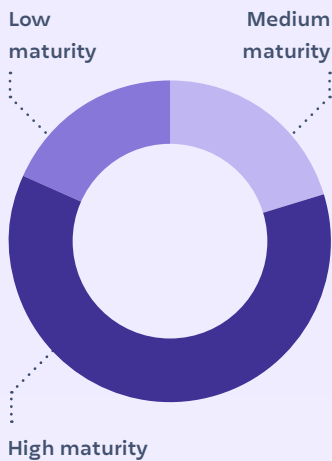
High maturity

How do we know? Through latent class analysis (which is just a fancy term for identifying distinct subgroups within a population) we mapped out three request management maturity levels – low, medium, and high. Defined by a set of shared goals and perceptions, the groups represent a spectrum of complexity in their request management practices. Each of these three subgroups are reflective of teams at different points along the request management journey.

The bottom line: maturity is nuanced.

While some traits can be great indicators of maturity – e.g. teams at the start of their journey are overwhelmingly likely to be from small companies, while more mature teams tend to be at enterprise organizations – our survey found that's not always the case. Even the largest teams with millions of dollars of tooling can have a long way to go in establishing an effective process, and even small teams in non-traditional industries can break the mold to set a gold standard for request management best practices.

By looking at the common challenges, toolsets, and goals across this spectrum of maturity, we're able to create a long-term roadmap for reaching peak effectiveness – along with setting some key milestones to hit along the way.

The road to request management is paved with good communication

MILE MARKER 1

Establish effective communication channels

Part of the key to a successful help desk is meeting your users where they already work. So what does that look like for today's teams? We surveyed organizations of all shapes and sizes to see how they stay connected with one another.

Teams are all over the map

While years ago it may have felt that remote work opportunities were few and far between, nowadays, nearly half of teams are working at least part of the time from home/remotely.

Whatever request process you establish for your help desk function should be rooted in your team's unique ways of communicating. A help desk built with only email intake won't be very effective if your users live in Microsoft Teams. Designing your help desk around the places your team gets work done, whether that's in one location, or with multiple points of intake, will help your team to stick to the process you've laid out.

WHERE ARE PEOPLE WORKING?

52%
Work mostly in office

31%
Work mostly at home

17%
Work evenly between the two
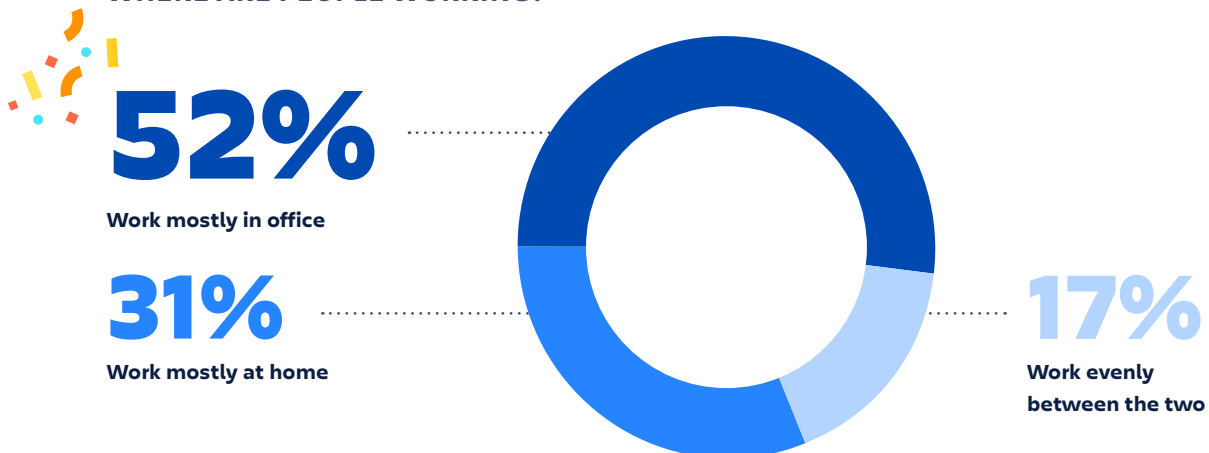
Tuning in to your team's way of communicating

Most companies, regardless of how established their request management function is, still rely on email as their primary channel for both general internal communication and receiving requests. Yet, about half of teams say they receive internal requests across at least two or more channels, and 25% receive them across 3+.

WHICH TOOL DOES YOUR ORGANIZATION USE AS ITS PRIMARY INTERNAL COMMUNICATION CHANNEL?

15%
Chat

12%
Phone

4%
Video

69%
Email
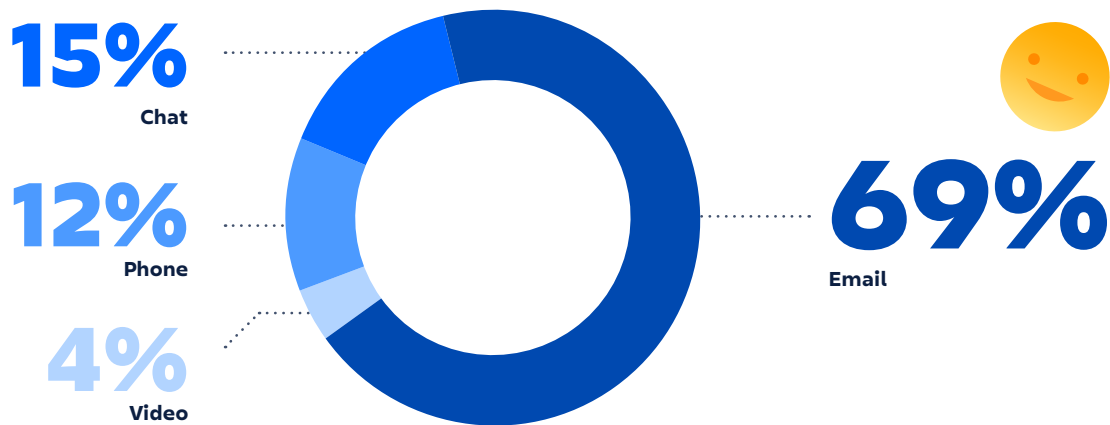
Let's chat about chat

While only 15% of teams use chat apps as their primary communication channel, more than half of teams have started using a chat application like Slack or Microsoft Teams in some capacity.

It comes as little surprise that medium to high maturity teams are more likely to both use chat applications as their primary communication tool and use chat-based ticketing apps to manage requests than those at the start of their journey.

Pro tip: Communication patterns can change, as we've seen in recent years. Design your ticketing process to capture requests from multiple places and bring them into one place. This ensures ALL your work is trackable and your team isn't left to manually input requests into your ticketing portal. There are plenty of options in the market today that already work across chat, email, and web. If you're looking to get started, check out a couple options here.

The journey of 1,000 requests begins with a single ticket

MILE MARKER 2

Set up request management tools and processes

Once you have a grasp on how your organization works best, it's time to design a request management system around that. How are today's teams constructing their help desks? We dug into the processes and tools they're using to manage the influx of help requests, as well as the biggest challenges they're facing.

Where we're going, we might actually need roads

Only about a third of low maturity teams (39%) have established a formal process for end-users to make a request. In contrast, 51% of medium maturity teams and 65% of high maturity teams already have a defined process in place for request intake.

Knowing that low maturity teams tend to be without a defined request process, it's no surprise that only 15% of teams beginning their request management journey are using ticketing tools. Meanwhile, more mature teams typically have some sort of ticketing or service desk tools in place (63%). Equally important for sophisticated request management teams are documentation or wikis/ knowledge bases (63%).

Pro tip: While a manual spreadsheet or a personal to-do list might suffice for now, these practices will be tough to scale. Think 10 steps ahead and ask yourself, how might your team grow? How will the volume of requests change as your org scales? Better to have a trackable system in place proactively rather than trying to establish a process later on.

Navigating bumps in the road

Identify and overcome challenges

While no struggle is exclusive to a certain level of maturity, our survey found there are common patterns of challenges that earlier stage teams can expect to face. (Hint: peep our checklist at the end for tips on how to tackle the challenges below.)

Newer request management teams feel they're off-roading

Lower maturity team challenges appear to have a strong correlation to their lack of ticketing tools and defined processes, as well as their lack of good documentation or knowledge bases.

47%
lack a central place for requests

40%
struggle with answering the same questions over and over again

33%
feel that responding to requests distracts from their main role

35%
say that they have no way to track the volume of requests they receive

Mature request management teams are ready to ramp up their journey

In contrast to earlier stage teams, these companies already have a basic process and tools in place. But since a third of agents are handling more than 70 requests a week, their challenges stem from compliance and volume issues.

29%
say that end-users often make requests that are already documented

28%
say that end-users don't follow correct procedures.

28%
feel that they need more people to answer requests

Calibrating your help desk compass
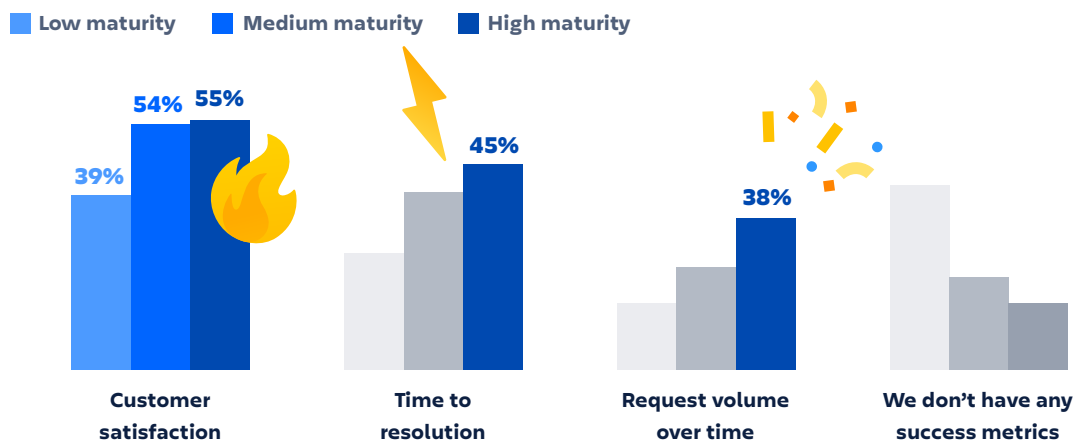
MILE MARKER 4

Measure progress

With a defined process and toolset in place, you can start to track how far you've come and how far you have to go. We checked in with our survey participants to see what numbers they're keeping an eye on in their dashboards.

You can't gauge where to go without gauging how far you've come

While low maturity teams are less likely to have any formal metrics (40% have no success metrics at all), more advanced teams are more likely to use multiple metrics to assess their request management success. In addition to CSAT, 45% of high maturity companies use time to resolution while 33% use request volume over time as metrics.

Regardless of where a company is on their journey, CSAT is the most universal metric (38% low maturity, 54% medium maturity, and 55% high maturity).

WHICH OF THE FOLLOWING METRICS DOES YOUR TEAM USE TO MEASURE THE SUCCESS OF YOUR REQUEST MANAGEMENT SYSTEM?

- ■ Low maturity
- ■ Medium maturity
- ■ High maturity

Customer satisfaction	Time to resolution	Request volume over time	We don't have any success metrics
39% / 54% / 55%	45%	38%	

Pro tip: If you're looking for a place to start, focus on volume. Being able to quantify your work can go a long way in helping to justify much-needed resources or headcount that will take your team to the next level.

Traversing the road ahead

Setting long-term goals

Once you have baseline metrics you can start to think about the next leg of your journey. It can be tempting to focus only on what's right in front of you, but the most successful request management teams will always be looking a few steps ahead. That's why we asked our survey participants about their top goals and initiatives for the next year.

Sophisticated teams map out specific milestones

Based on our survey, those at the start of their journey are more focused on higher level, more generic goals over the next year like improving team efficiency (72%) increasing customer satisfaction (67%) and reducing time to resolution (57%).

Meanwhile, those that are farther along are setting their sights on more specific goals that aim to reduce the impact of end-users not following the process and the high number of requests they are sent. 67% of high maturity organizations are working to reduce ticket volume, 57% are looking to automation to handle some of their requests, and 54% are building out self-service support resources.

Pro tip: Automation can seem intimidating, but there are simple ways that even low maturity teams can start using it. Look for a lightweight ticketing tool with simple workflow automations. Even basic routing and prioritization features can save your team precious time.
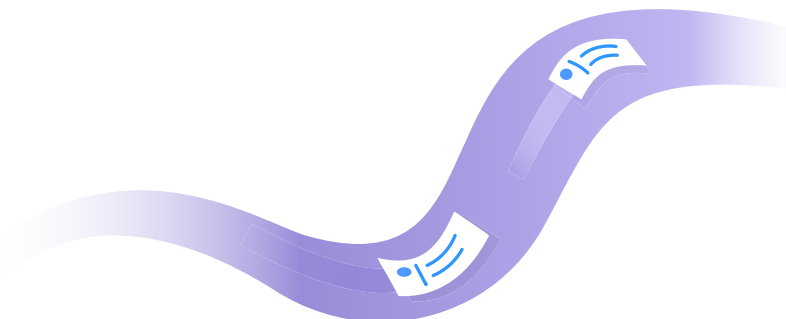
The ultimate checklist for your journey

They say success is about the journey, not the destination, and when it comes to navigating the ever-evolving request management space, you're likely to encounter some twists and turns.

Our survey shows us that while every team is taking a slightly different path, there are a few key indicators that will help ensure you stay on the right track. If you're new to ticketing and feeling ready to blaze the trail and evolve your request management practices, the checklist below uses our survey findings to give you a foolproof starting point.

Time to pack your bags and hit the road!

- ☐ **Survey the landscape.** Audit the rituals, communication channels, and processes your organization currently uses and where they diverge or intersect with your current request management process.

- ☐ **Put a ticketing tool in place.** Spreadsheets and manual tracking don't scale. Find a lightweight solution that allows you to add just the right amount of structure to how you capture requests.

- ☐ **Start (or re-visit) your knowledge base.** Work smarter not harder. Get ahead of repetitive questions, cut down response times, and avoid long ticket backlogs with a simple, up-to-date knowledge base.

- ☐ **Identify trackable metrics.** Define more specifically what you can measure and what success looks like for your help desk. This will guide you in the practices and tools you adopt, as well as help showcase your team's progress and value.

- ☐ **Define your milestones.** Map out what the mile markers above look like for your team's unique journey – and don't forget to map them to higher-level business goals.

About Atlassian and Halp

Atlassian unleashes the potential of every team. Our team collaboration and productivity software helps teams organize, discuss, and complete shared work. Teams at hundreds of thousands of large and small organizations – including Bank of America, Redfin, NASA, Verizon, and Dropbox – use Atlassian's project tracking, content creation and sharing, and service management products to work better together and deliver quality results on time. Learn more about our products, including Jira Software, Confluence, Jira Service Management, Trello, Bitbucket, and Jira Align at **atlassian.com**.

Halp is Atlassian's lightweight helpdesk tool for modern teams. Capture, prioritize, track, route, and report on employee and customer requests directly from Slack or Microsoft Teams. Halp is used every day by teams like GitHub, Delivery Hero, and Peloton to manage tickets across business and IT support teams like HR, Sales Ops, Legal, Incident Management and more. Schedule a demo to see it in action.

Want to learn more?

▦ **Schedule a demo** to see Halp in action.

Farther along on your request management journey?

🖥 Check Atlassian's high velocity ITSM solution, Jira Service Management. **Try it free**.

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