Episode 33: Reinventing IT support with swarming models

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Oliver Hussick: **Jon, thanks for joining me. In our last podcast, we talked about purpose-led organizations and digital transformation, and we touched briefly on the topic of swarming. So, tell me what is swarming and what is its purpose?**

Jon Hawkes: Thanks, Oliver. It's a pleasure to join you today to talk about swarming, an innovative approach to problem-solving within organizations. Swarming addresses the shortcomings of traditional tiered support models by focusing on a single, unified solution. This approach offers a more effective and efficient way to tackle organizational challenges. The approach involves removing silos, tiers, and agent hierarchy, promoting collaboration and problem-solving. It encourages learning and improvement for all service users, similar to how bees swarm together to fend off threats. By fostering a collaborative environment, the service improves the overall experience for all users.

Oliver Hussick: **Amazing. It sounds rather interesting. Why is this deemed to be better than the existing service desk? What are the advantages that it brings?**

Jon Hawkes: So that's a good one. If I were to try to think about a couple of main advantages, I would say firstly, the typical support approach involves pushing problems and incidents through a structured system, resulting in longer wait times, ticket hops, and unsolved issues. This leads to a backlog of work, and lower-tier agents who are fielding calls or logging and are not learning or developing. They are not tackling ticket resolution, as it is not their problem. Instead, they pass it on, causing a backlog of work and hindering growth and development. To improve support, it is essential to adopt a more collaborative and efficient approach, involving all team members and ensuring that the problem is resolved before passing it on.

Tiered support structures often prioritize SLAs and KPIs, which are numbers like phone response time and ticket closures. These metrics are useful but do not fully reflect the experience or value provided to service consumers. They do not truly reflect the value of the service provided.

Swarming support models focus on providing user-centric experiences and maximizing the value of contributions. They emphasize sharing, growth, and availability of knowledge, with the belief that the best ticket is the one that doesn't exist. However, this sentiment may not be as appealing as it may seem. The overall goal is to create a user-centric approach to support models, ensuring that users have a positive experience and contribute to the work.

But one of the foundational pillars behind swarming is that it connects people with the right knowledge to uncover answers. This connection helps uncover the right knowledge, which should be documented and available for people, if not already. It is similar to a problem having a known solution, which should also be available for those who don't have the answer.

Oliver Hussick: **It makes a lot of sense. But how does it achieve those truly transformational aspirations? Does it aim to fix everything for everyone all the time, or are there specific or prescribed user cases? What's it good at and conversely, what's it not good at?**

Jon Hawkes: I think with almost any new methodology of working, any new model to operate under or align with, it's quite easy to think that it would fix everything, but that's not the case. Swarming is not a silver bullet, it is a transformation that requires significant cultural and behavioral changes. It is not a tool-based approach, and there is no one-size-fits-all solution. Instead, it involves recognizing the diverse skills, organizational knowledge, and work types of your people and implementing a tailored approach. There is no out-of-the-box swarming solution, and it is essential to recognize and adapt to the unique needs and challenges of your organization.

This approach requires bringing experienced people into working circles alongside front-line agents, focusing on knowledge and capability. Encouraging collaboration and knowledge sharing can change the way people connect and work together. Connecting work to existing knowledge is crucial, as having the answer at the beginning doesn't necessarily matter. Everyone should be able to handle tickets and see them through to resolution, as having the answer at the beginning doesn't necessarily matter.

The answer to this question may already exist or be found together. A silver bullet is not necessary in all cases, as many daily issues, such as password resets and Outlook reinstallations, are simple every day break fixes that don't require swarming. These simple fixes can be found together, making it a more efficient and effective solution. Swarming is particularly useful for new or complex issues, as most support agents are unfamiliar with these tasks. However, swarming is not necessary for common problems, as most agents may already have knowledge-based articles on how to unlock user accounts, reset passwords, or perform Outlook reinstallations. Instead, a knowledge-based article can be found for these tasks.

Swarming is a technique used when a problem is new, complex, or lacks recorded knowledge or history. It involves involving an obscure team within the company to gather inputs from a wide range of people with diverse skills and knowledge. This approach is a fundamental aspect of education, as it allows individuals to showcase their expertise and reputation through a profile, demonstrating their willingness to help and collaborate. Their availability to collaborate and show their strengths and what they want to learn and what they want to work on together. And so, when a tier-one agent gets a complex problem that he doesn't know how to fix? They don't have to put it on hold. This allows them to address complex problems without waiting for someone to pick them up. They can identify the specific person they need help

from and know who to reach out to for solutions. This approach allows them to find a solution together, ensuring a successful and efficient collaboration.

Oliver Hussick: Incredible. There's no doubt that you've spent a long time thinking about what it's trying to achieve and it's not just a case of musical chairs. So, how easy is it to implement this? Is it an overnight seat swap? Do we just move our agents around and mix them up as we would do at a party? Do we have to go full swarm from day one? You mentioned it's not tool-based, but are there things that assist, support, and create a platform for swarming to be effective?

Jon Hawkes: So, that's a really good set of questions. Probably the initial set of questions that clients consider when evaluating swarming, as it is not as straightforward as musical chairs in the office. It can start with simple questions and articulating new aspirations, rather than a complete overhaul. Swarming relies on the depth and breadth of people's skills, enabling most or all of its goals without re-outfitting or retooling the service desk. It is tool-agnostic, focusing on problem-solving, changing behaviors, and collaboration in a new way.

So, what is it that we're trying to change and why do we need to change it? Do we want to bring solutions to people quicker or improve our self-service? Or are we wasting time by repeating efforts on lots of very simple tickets every day? However, many products and development teams are constantly distracted by agents who lack the answer to specific questions, causing first-line agents to not grow or develop as much as they could. This can negatively impact the overall success of the organization.

Being able to start answering some of these questions means that it's not an overnight swap and that there isn't an out-of-the-box solution. But just beginning to think about some of these questions. Perhaps that's where the answer is swarming. Maybe it's not like musical chairs, but more about how we work together and how we can encourage collaborative behavior.

Oliver Hussick: Wow, incredibly comprehensive. Thank you, Jon. With all of this change and disruption, it sounds like there might be a risk to ongoing service. If it's not an overnight spot, we're not doing a cutover at midnight, we are phasing our transition to a hybridized model or a long-term transformation. How do we make these changes in our support organizations without impacting service?

Jon Hawkes: Yeah, that's the hard bit. There are numerous benefits that we could list to the user experience and people and to the service itself, but they require extensive testing and trial and error.

The key to success in swarming projects lies in the approach to discovery, planning, and governance. The Consortium for Service Innovation strongly advocates for deploying in waves or phases, rather than a big-bang approach, as this approach leads to more efficient and effective implementation.

Establish different checkpoints that you want to reach before you're able to keep moving forward. While it's tempting to tackle everything at once, a phased approach allows for caution and a more manageable process for clients and customers. For example, a pilot model can be used as a safety net for swarming problems, allowing for specific solutions before scaling up. This ensures security and prevents risking everything, providing a lifeline to the system.

Maybe you can consider designing a model to classify work types, knowledge, and people within your organization. Implement an adoption strategy to gain support from the wider organization. Revisit your strategic framework for supporting collaboration processes and the areas your support organization values.

If your organization doesn't value collaboration, it's time to change. Collaboration is the backbone of swarming and can be challenging to implement without risking ongoing operations. HCLTech Workplace Experience Consulting (WXC) has chosen to adopt this approach, as it helps us navigate the challenges of swarming without compromising the ongoing operations.

Oliver Hussick: Working with a consulting firm with extensive experience in this area, such as WXC, has numerous advantages. So, how does WXC contribute to this transformation?

Jon Hawkes: It's my favorite question. As I've already mentioned, this transformation requires careful consideration and buy-in, as it fundamentally changes the way people work. It can be done with existing tools and people, starting with a few simple questions. While it may not be an overnight change, it is a significant change that requires careful consideration and buy-in.

Are we consistently encountering the same issues? Are we striving to enhance the experience and value of our services? How can we empower consumers to access self-service solutions, encourage collaboration, and recognize and reward the co-creation of value in our support staff? Instead of pushing problems through a linear structure, we should focus on promoting solutions to people, rather than focusing on our systems.

Some of these questions, I believe people might have thought about when evaluating swarming. However, this change will be different for everyone. Understanding things like the priorities of your agents, their skills, and their attitudes toward knowledge sharing helps to understand the starting point and initial qualification. An organizational analysis is crucial for identifying high-level attributes and critical values of clients. As consultants, it is essential to work on understanding these factors to initiate the transformation.

Another important part is motivation. Tiered models, which are often criticized for being carrot and stick, can be effective for repetitive and simple tasks. However, they may not be suitable for activities that require thinking, judgment, or investigation. This is because these layered structures can be a bit of a carrot and stick, requiring quick deployment of resources or a red SLA to avoid penalties. In contrast, tiered models can be more effective for more complex tasks that require more thought and investigation.

Swarming offers an exciting approach to motivating agents, focusing on mastery, learning, and empowerment. Agents feel trusted and empowered to make decisions that benefit others, and autonomy over their work is crucial. This autonomy fuels a sense of purpose in the workplace, as agents feel they are adding value and improving experiences for others. Ensuring agents feel trusted and empowered to make decisions helps them feel valued and empowered.

Working with care and promoting specific behaviors in employees is crucial for motivation. We, as a consulting practice, aim to give users a voice and represent clients' needs, their providers, and their consumers. We aim to create a user-centric service that delivers the experiences they want to support and create with swarming. By promoting specific behaviors and prioritizing drivers and needs, we aim to create a user-centric experience that truly supports and creates the desired experiences.

Oliver Hussick: Amazing. I'm seeing some of the outcomes that we regularly aim to achieve. You've also mentioned some sneaky teaser trailers around the framework for motivating people with mastery, autonomy, and purpose. The focus is on improving the agents' experience at a service desk, ensuring greater satisfaction for both customers and employees. This elevates the service desk's role as employees and partners, delivering a better experience for both users and support desks. Empowered and enabled employees create a better experience for clients, ultimately benefiting the organization.

Going back to the purpose-led topic that Kimberly and I discussed in the previous podcast, I'll just ask one last quick question: Does this call for more or fewer agents? Am I saving money? Am I driving recruitment and retention? What are we talking about when we talk about numbers and resources? Is it easy to answer?

Jon Hawkes: That's a lot of different questions in one, and they're all excellent ones. The answer is pragmatic and not prescriptive, as everyone must adapt to their own approach. There is no right or wrong way to do it, and expectations for cost and return on investment are subject to change based on the specific project. The scope of expectations is vast and can be altered by the specific project being pursued.

Retention is crucial for improving the workplace experience for both consumers and service providers. A less repetitive work environment increases engagement and value, as employees feel more valued for learning and developing new skills. The breadth and depth of skills are essential for personal growth and career advancement, often focusing on developing new career paths that may not have been considered otherwise.

Retention is crucial for success, and lower attrition can lead to an indirect return on investment. However, the number of agents is often under scrutiny, especially as automation and self-service technologies become more prevalent. There is no right or wrong number of agents, but it's crucial to assess the experience your people are receiving. The number should be based on the quality of service you can provide. If your people are too stretched, exhausted,

stressed, or incapable of finding solutions, more agents may be needed. Conversely, if everyone is twiddling their thumbs, there may be no need for more agents.

Oliver Hussick: Well, I think it is crucial to understand the aspirations and build a successful experience for agents and service consumers, ultimately impacting clients. It is essential to focus on building a strong foundation and delivering a positive experience to both parties.

Jon, I don't know if we've created a swarm today, but we've certainly collaborated and shared extensive knowledge. We appreciate your contributions to the WXC model and look forward to revisiting similar topics with team members in the future. We appreciate your collaboration and look forward to further discussions on this hot topic.

Jon Hawkes: Perfect. Well, thanks, Oliver. It's been a pleasure.

Oliver Hussick: Wonderful! Have a great day.