Number:	05.1.12	**Page:**	1 of 2
Latest Version:	1.1	**Revision Date:**	04/21/2016
Effective Date:	04/21/2016	**Replaces:**	1.0
Revised By:	Joshua Graves	**Review Cycle/Date:**	Annually
Reviewed By:	Amy Max	**Reviewing Unit:**	Service Desk
Title:	Service Desk Workload Management SOP		
Description:	This document is the operating standard for Service Desk staff to manage their workload.		

Service Desk Workload Management

Standard Operating Procedure

1. General Statement of Purpose
   1.1. This document contains the steps for checking cases, staying current on assignments and updating cases assigned to self. These steps enable Service Desk staff to more easily manage their workload.
2. Scope
   2.1. This document pertains to all Service Desk technicians and analysts.
3. Discipline
   3.1. Service Management
4. Terms and Definitions
   4.1. Customer Relationship Management (CRM) – A customer service tool used to create, work, track and update customer cases.
5. Instructions
   5.1. Upon arrival to work each day:
      5.1.1. Login to phone.
      5.1.2. Login to IM and group chat.
      5.1.3. Check open cases assigned to you and CRM unassigned.
      5.1.4. Check Major Incidents and Alerts Pages.
   5.2. Staying current on assignments throughout the day:
      5.2.1. Check email to follow up on any cases that need attention.
      5.2.2. Check the “My Work” dashboard in CRM and update your cases daily.
      5.2.3. Be aware of information and/or assistance needed in the Service Desk public and private group chats.
   5.3. Case Updates - at least once a day or as a case’s status changes.
      5.3.1. Pending Customer – If you are no longer able to work on a case, due to waiting for the customer to respond to either an email or phone call, change the status to Pending and add a review date of the next day. Add a reason for why the case is being put into Pending status.
      5.3.2. Pending Vendor — If you are no longer able to work on a case because an outside vendor must attend to the issue, change the status to Pending and add a note to the case explaining why.

5.3.3. Pending Due Date – If you are not able to work on a case because it is something that needs to be done in the future, change the status to Pending, add a note to the case explaining why and add a review date.

5.3.4. In Progress – Once you begin working on a case, change the case status to In Progress. Include a daily note to help identify progress, if needed.

5.3.5. Resolved – As soon as a case is resolved, update the solution and change the status to Resolved.

5.3.6. Out-of-Office Case Handling

5.3.6.1. Expected Leave – When Service Desk technicians or analysts are going on expected leave, they should pass on any unresolved cases that may need to be worked and are not in Pending status.

5.3.6.2. Unexpected Leave – When Service Desk Technicians need to take unexpected time off, they should notify their Lead using standard protocol as defined by the Service Desk Manager. The Lead should look at the Technician's open cases to see if any need attention during that time.

6. Roles and Responsibilities

6.1. The Service Desk Technicians and Analysts are responsible for following the steps provided to manage their workload.

7. Limitation or Implementation Notes

7.1. In order to follow the steps in this operating standard and to successfully manage their workload, Service Desk Technicians and Analysts must have access to CRM, Outlook and IM.