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Facilities management help desks

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Facilities Management Help Desks

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Abstract

Purpose

The purpose of the study is to provide an exploratory look at facilities and estates management help desks in four different case study organisations.

Methodology

A case study methodology was adopted, with semi structured interviews and observations as the principal methods to collect data.

Findings

The findings suggest that the key factors for the success of a FM help desk include mapping the out all customer requirements, recruiting the correct operating staff, ensuring an appropriate working environment and client communication once the help desk is operational.

Originality/value

At the time of the study there had been relatively little research completed focusing specifically on FM help desks. The paper will be of value to facilities and property managers who are considering implementing a help desk service.

Keywords

Help desks, facilities management, call centre, NHS

Research paper

1. Introduction

Although limited, there has been a small amount of research conducted looking at the benefits of facilities management (FM) help desks. A study completed by Price & Clark (2000) looked at the development of the Support Services Directorate (SSD) service centre (help desk) in a UK NHS District General Hospital during its final stages of commissioning. At the time of the study there was no other known NHS Hospital which had implemented such a comprehensive help desk. A second part of this study involved a wider survey of customer priorities and current perceptions of service amongst help desks users. The findings from the survey established that the most important customer requirements surrounded communication, i.e. being informed of delays and being able to speak to a person rather than a machine. However some aspects of communication also formed the least important customer requirements, i.e. weekly updates of non-urgent jobs. The service centre was able to modify its service to reflect the findings before implementation; for example the service centre was routed through to the Trust switchboard for out of hours operations.

Other authors have studied help desks and suggested generic guidelines for choosing the right software, getting the help desk up and running and achieving better customer service. Williams (1999) offers a "step by step guide to system selection". His framework starts with conducting a feasibility study through to full implementation and a post disaster recovery backup procedure. The guide does provide a useful starting point or direction for choosing a help desk system. However in practice the suggested sequential process may not be realistic, a more concurrent or parallel progression to choosing the system may be preferable. In particular the customers' consultation period and spending time with other organisations operating successful (and non-successful) help desks should be considered at the beginning. Jervis (1998) supports the view that all users/customers need to be consulted and explains that *"the user budget-holder will view the performance of services differently from the ordinary business customer. Senior business management may well have different expectations."*

The other important point which Williams (1999) highlights is the difference in providing a facilities/estates help desk compared to a IT help desk:

"providing a customer support service through a help desk for an organisation's entire property portfolio is very different and much more difficult (than an IT help desk). Calls, which might range from a blocked toilet to a serious power failure, need more time and resources to deal with, a fact that will be reflected in the type of system required to record, process and manage such a wide variety of needs. The principle, though, is exactly the same - to respond to a customer's enquiry as quickly as possible and follow it through until it has been satisfactorily resolved".

Verghis (2002) discusses how to get the help desk up and running. Amongst the points raised are staffing issues and a debate as to whether staff on help desks need to be experts or generalists. His argument is that most help desk managers prefer staff with good communication skills, customer service, experience and an ability to handle stress, over and above other attributes.

The objective for this study was to outline, at the time, the current developments in FM help desks. In addition a number of case studies were undertaken in order to suggest best practice in relation to managing FM help desks.

2.0 Methodology

The central methodology was to utilise a case study approach. The case study, like so many concepts and definitions used in research, has differing and contradictory definitions. Hakim (1987, pg.61) provides a simple definition that a case study will *"provide descriptive accounts of one or more cases"* she goes onto to say that *"the case study is the social equivalent of the spotlight or microscope."* Yin (1989) goes on to further define case study research as an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when

the boundaries between phenomenon and context are not clearly evident. Hence the case study methodology concentrates on a specific entity or phenomenon that has identifiable boundaries. The entity taken as the case should normally be studied in its natural setting, using a holistic approach and employing multiple methods (Stake, 1994; Hakim, 1987; de Vaus; 2001). The focus for this case study was the FM help desk. The principal methods of data collection were the qualitative semi-structured interview and observations.

The semi-structured interview was with the manager, or equivalent representative who had operational responsibility for the help desk. The interview questions were developed from existing research studies in help desks (Marcella & Middleton, 1996) and by using elements of the benchmarking survey discussed above by Price & Clark (2000). The objective of the interview questions was to focus on the staff, implementation, and service issues rather than technical, software, financial or logistical elements.

The other principal method of data collection were observational studies on the operators while they took calls. Whilst this did not provide in-depth data it did enable the researcher to gain an insight into how the operators were dealing with calls and the atmosphere and environment within the helpdesk. The observations also offered the opportunity to engage in unstructured interviews (or focused conversations) with the operators.

Four organisations were selected to act as case studies for the study. Due to the exploratory nature of the study a judgemental or purposeful sampling technique (Collis & Hussey, 2003) was employed to select the organisations. Therefore participants (organisations) were selected on the strength of their experience in operating FM help desks. Two organisations were from UK NHS Hospitals and two were private/commercial organisations.

Table 1 - Summary of the main characteristics of each case study.

Case study	Characteristic
Case study one	Commercial facilities and estates help desk with a number of different clients.
Case study two	NHS facilities and estates help desk.
Case study three	Commercial facilities and estates help desk with one principal client.
Case study four	NHS facilities and estates help desk. The Trust has two large acute hospitals.

The interviews were tape recorded and then transcribed verbatim. All references to the Trusts, organisations and the names of those participating were removed to allow anonymity. Thematic analysis was performed on the transcripts in order to develop a "coding" list to further categorise the information. The final list of themes was help desk development; clients (or users); contractors (or tradesmen/porters); training; call process; culture; staff recruitment; staff issues; system/software; performance monitoring; future developments.

In the following section each case study is described separately with its own conclusions. These are then considered collectively and some best practise guidelines are suggested at the end of the report.

3.0 Findings

3.1 Case study one

The help desk featured in this case study had been in operation for approximately four years. It started out as a small operation with six operators and had grown steadily as the business needs built up. As more clients were taken on board the number of help desk operators also increased.

The case study focused on a single help desk; however it was actually one of four which was run by the company to supply property and building services to its clients. The help desks are organised by client type, i.e. all financial clients call a particular help desk, all retail clients another etc. The help desks are spread geographically across the country and serve the whole of the UK, including some off-shore sites such as the Isle of Man.

The services which the help desk co-ordinate are solely property and building maintenance. There are no soft FM services such catering requests, room bookings, portering requests etc. included. Nor is the maintenance of small portable equipment such as fax machines, photocopiers or PC's covered.

The services do include cleaning contracts, furniture procurement, office moves and grounds and gardens maintenance. In detail the range of services which the help desk covers includes:

Table 2 - List of services covered by Case study one FM help desk

CCTV	Lift maintenance
Confidential waste	Lighting
Door repairs	Pest control
Door access controls	Plumbing and waste water
Drains	Redecoration (internal and external)
Electrical distribution and cabling	Roller shutter doors
Fire alarms	Roof repairs
Fire extinguishers	Security systems
Furniture moves	Security passes
Furniture repairs	Safes
General cleaning	Signage
Grounds/Garden maintenance	Structural repairs
Heat and air conditioning	Water systems
Hygiene services	Window cleaning
Internal fabric repairs	Windows/glazing

There are 11 different clients served by the help desk and over 6000 sites covered. There are approximately 1500 calls handled per day by 24 FTE operators. The call demand is fairly constant apart from during hot spells over the summer when call volume increases due to repairs requested for air conditioning units.

The help desk is open from 8am until 6pm; calls which are taken out of these times are transferred over to another help desk which operates a 24 hour service. There is a prioritising structure for calls taken out of office hours and if necessary an emergency escalation procedure is used.

Calls are handled by trained operators, however the process is largely software driven. The operator first identifies the site by taking the post code (the client is already identified from the phone number they used to call the help desk). Two contact names are then taken from the site and then a full description of problem, request, job etc. There are no 'named' contacts or informed clients on each site and it can be anyone calling through to the help desk, however it is usually the office manager, building manager etc.

The operator then assigns a priority to the job. Most jobs or requests "self prioritise" purely on the severity and potential risk associated with them, however an operator is empowered to modify the priority of a job/request. At times the operator will enter a discussion with the caller about a conflict of opinions over the priority of a job. This happens infrequently and the operators are well trained to cope with such situations. For more urgent or priority work the help desk operator would pass the job over to an Outbound calling team who would contact the relevant contractor and notify them of the job.

Basic training is provided for new operators during their induction programme. New operators are shown around the building, introduced to their line manager and work colleagues, given a health and safety presentation and generally give them a flavour of the work they will be doing. The formal training programme consists of the use of the telephony equipment; use of the PC and software; call handling techniques; open ended questioning techniques. The training package which they receive before taking live calls is PC based and they work through the software which they will be using.

Depending on which client type they will be allocated it can take up to three months before an operator is ready, however after about a month new operators are confident enough to start taking calls. Once they are trained there is a period where the new operators work alongside mentors and coaches to ensure they are competent taking calls. There are also subtle little considerations such as seating the new operator between two experienced staff which help to ease them into taking live calls. After staff are trained to deal with certain client groups they can work to become 'multi-cliented'. The multi-clienting is linked to pay and so as operators become more experienced in dealing with different clients their pay also increases.

The help desk monitor performance in two ways; internally on how the help desk is performing and externally through how the contractors they use are performing. In terms of monitoring internal performance there are monthly reports in which service levels for each team and individual operators are produced. Any problems or training issues which occur from the reports are fed back to the training and coaching staff. For external performance monitoring and contractor/job performance data each client receives a monthly report. This outlines the performance of the help desk, SLAs, call durations, number of calls and also information on the contractor service levels.

The help desk also organises monthly meetings with clients to discuss the reports and go over any problems or issues. In addition the meeting serves as a two way process where clients can make suggestions on the performance and operation of the help desk.

The organisation is quite clearly at the forefront of developments in providing facilities and estates help desks. Their help desk stands as the flagship within the organisation and is driven by market needs to stay ahead of their competitors. The philosophy which underpins the help desk is the need to provide top class customer service to their clients. This in turn is supported by the type of staff they look to employ and the culture which the organisation is trying to harbour. The staff and culture of the help desk appear to be integral elements to its success.

Whilst the size of the help desk and number of sites it serves may potentially prove a barrier to providing a personal touch to their services, these difficulties have been overcome. Through observation it was obvious that the help desk operators do provide personal touches to the service while at the same time keeping professional standards at an optimum.

3.2 Case study two

The help desk in case study two is part of a NHS Trust. It is managed by the Hotel Services department and located on a District Hospital site. There are approximately 650 calls handled per week by 2 FTE operators.

The help desk is open from 8am until 5pm Monday to Friday, incoming calls which are outside these hours are transferred to the switchboard. The help desk software is also transferred through to the switchboard operators which allows them to work using the same system and screens. Therefore to the users the help desk is a seamless service, open 24 hours a day, seven days a week.

The help desk serves several sites and organisations, these include the main hospital on which the help desk is located and other hospitals and sites including several clinics, health centres and

a hospice which are part of a nearby PCT. Primarily the help desk takes job requests for the estates department and portering team. Table 3 lists the range of services covered.

Table 3 - List of services covered by Case study two FM help desk

Estates	Hotel Services
Electricians	Portering
Joiners	Catering (ad-hoc)
Painters	Laundry
Builders	Car parking
Fitters	Room bookings and hospitality

The help desk has been operating in its present form using the current software for seven years. During the first four years the help desk purely covered the estates job requests. The software was then updated to integrate the portering requests into the help desk. The system went live with the additional portering requests and has been providing this service for three years.

The integration of the portering service into the help desk led to some problems which the Trust needed to tackle. These problems were not directly related to the actual "call-process" but as a result of some staff resisting the change process, the Hotel Services Manager outlines some of these issues:

"I don't think we had major issues until we got to the stage of integrating the portering service and that got very very difficult..... for a number of reasons, the porters felt that it was a big brother tactic. They also felt very strongly that they were going to lose touch with the nursing staff and they would be controlled down here (by the help desk), where as previously the ward staff rang them and obviously they lost the links with the users"

As outlined above, previous portering requests were issued direct from ward staff (nurses) by either paging or calling the porters room. With the integration of the portering service into the help desk the porters felt they were being pulled away from activity around the nurses. But the feedback from nurses on the new portering system showed a different view, again the Hotel Services Manager explains this:

"What we found within the first three months of using the system was that the users (nurses) were then saying 'this is great we ring one number and the job is processed and is dealt with'. And this was from the nurses where as previously they'd have to page someone, wait for a response, tell them where to go - it was a one-stop shop!"

At the time of the study, in spite of the above enthusiasm from the nurses the resistance to change from the porters was still evident. This problem was identified as a cultural concern within the porters department who still view the help desk as a monitoring tool and as mentioned above a "big brother tactic". This view is slowly changing as old members of the portering team leave and new porters are employed who have no preconception of the help desk and previous system.

When calls are taken by the helpdesk the operator will not allocate a priority, instead it is done by the relevant tradesman who receives the job. When the work is finished the estates department will enter the relevant information back into the system and close the job. For this reason the estates work is not fully integrated into the help desk, the operators just take the call and then pass the job onto the estates department who prioritise, plan and close the work. The level of control retained by the estates staff may indicate why there was less resistance to the implementation of the help desk from them compared to the portering team.

The exclusion of the estates work from the help desk has also lead to problems with information and feedback not being communicated to both the help desk and their customers. For example when extra parts need to be ordered to complete a job the tradesman should enter a note for the

delay on the system, but this is not always done. Thus when the ward staff call to enquire about the job the help desk operator does not have the information available to inform them.

Calls taken for routine portering requests are prioritised and directly allocated to porters using radios/bleeps by the help desk operators. The name of the porter who has been allocated the job is logged on the system. When the porter has completed the job he/she rings back to inform the help desk who can then note that he/she is available to take another job.

For new help desk staff there is a two week induction training programme. This programme consists of a departmental induction which outlines all aspects of Hotel Services then an explanation of the general duties which are required by a help desk operator. The software training is provided by the experienced help desk operators working alongside the new recruits. The final part of the programme is the Trust Induction.

Operationally the help desk is managed by the Hotel Services Department. There is a multi-disciplinary group that meets monthly to discuss issues surrounding the help desk. This is attended by representatives from the FM team, estates team, telephonists and the hotel services team. The group reviews the service and looks at any issues that are pertinent and aims to resolve them.

It is clear from the help desk that its strength lies in the skill and experience of the operators. A help desk operator's knowledge of the Trust is a key factor for success. The working relationship between the operators is also important and the need for them to understand what work the other is co-ordinating is essential. The other strength of the help desk is the overview the operators have of the porters and their related activities, this includes understanding how long certain jobs take and appreciating other factors involved such as travelling times.

With the speed of change of technology it is imperative that help desks keep up with these changes otherwise what was once considered a leader in a field can soon get left behind. At the time of the study the help desk operates using non-windows based software, this immediately makes the system look and feel obsolete. Although the department was upgrading the software to a windows based system. What they also needed to consider was how their users/customers can access and submit requests using new technology, this may include intranet access to the help desk. Such ideas have been discussed, however until all wards had either email facilities or access to the Trust intranet then it will make such progression difficult.

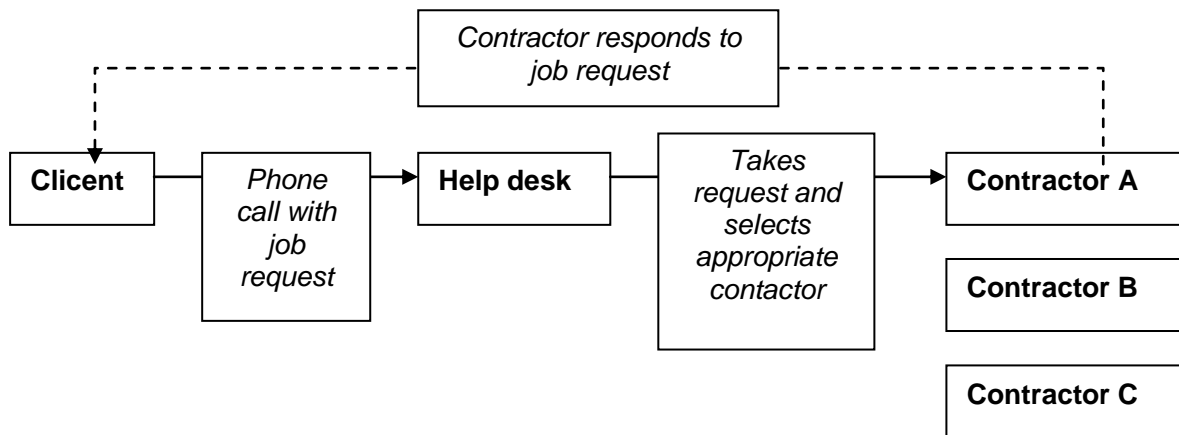
The other significant observation which the case study highlights is the need to bear in mind the potential resistance to change from different staff groups and the underlying reasons behind them. In this particular case resistance to change was most notable from the porters, who were the group greatest affected by the implementation of the help desk.

It could be argued that the estates work requests are not actually fully integrated into help desk. The help desk does little more than act as a point of contact or "middle man" and passes estates work straight to the estates department. This may be one reason why little resistance to change was encountered from the estates department during the implementation.

3.3 Case study three

The help desk included in this case study is part of a commercial organisation. It takes approximately 1000 calls a day, of which the large majority are from one client that has over 3000 buildings and properties spread throughout the United Kingdom. The types of calls taken by the help desk are related to building and property management, including some improvement requests and office relocations. The range of calls also includes catering and cleaning job requests. Although the help desk takes calls and job requests relating to property, they do not actually manage the services. Their client has contractors already appointed to manage the various services. Diagram 1 below provides a simple illustration of this.

Diagram 1 - Client/help desk/contractor relationship



The help desk had 42 FTE operators working throughout the day on different shift patterns to suite business needs with call demand peaking during the morning. The help desk was open to receive calls 24 hours a day and 365 days a year. Due to the size and operation of the help desk natural comparisons can be drawn to a call centre. When asked about how they make a distinction between a call centre and their help desk the manager replied:

".....whilst we are taking incoming calls we are trying to 'help achieve', so we are a help desk rather than just a call centre..... we are trying to provide more than just a call centre type back ground, (we are) helping people"

The help desk management put across a clear message for the need to separate their business and services from that of a call centre. Nevertheless the operators are monitored on their performance for number of calls taken, average call length, time spent off-line (in "wrap-up"), break times etc. All this gives a call centre flavour and the "big brother" approach to monitoring operators. However when operators were asked about the notion of being monitored it became apparent it was not an issue. Operators who had experience of working in call centres and could compare the two environments reported a much more relaxed atmosphere working in this help desk.

The help desk employs an Interactive Voice Response (IVR) system which separates out the three types of service offered 1. New jobs; 2. Chase or escalate jobs; 3. Budget line. Calls made to the help desk can be from a variety of people but are typically the office manager, building manager, caretaker, receptionist or switchboard operator. Usually the building (or group of buildings) will have a named contact or someone delegated to look after building and property matters.

Contractors are required to respond to jobs within the required timescales set out in the SLA. After a contractor has attended to or completed a job they contact the help desk so that the necessary information can be updated on the system. If the time period set for a particular job expires and the contractor has not contacted the help desk then a system "flag" is automatically generated to alert an operator to this. The Pro Active team would then make a phone call to the contractor to discover the reasons for the delay. The customer who requested the job is then called and advised of the delay and the new estimated time of arrival.

There is a standard induction and training programme provided for new staff. The training programme is described as "intensive" and covers how to use the software, call handling/logging and customer awareness. After the standard training programme is completed staff then undertake a further specialist course depending on which part of the business they will be working in. The training programme can last up to three weeks before a new recruit can expect to start taking calls. The final week of the training is usually spent shadowing an experienced help desk operator.

As discussed earlier, the help desk management is quite clear on the distinction between their organisation and a call centre. For example the help desk uses scripts but they do not have to be rigidly adhered to. They prefer the operators to communicate in language that is judged appropriate for their clients/callers.

This level of staff empowerment and flexibility is also reflected when job priorities are being agreed. The process allows the customer to pick the priority, but the operators are expected to enter into a discussion to select a priority which is realistic. Operators are coached to encourage customers to choose priorities that they know contractors can achieve.

The management realises their success lies in their ability to recruit and retain quality and experienced staff. However, locally competition for staff is fierce and the high percentage of temporary operators creates problems with absence. Although the help desk doesn't have any attendance incentive schemes, they are aware of the need to manage absence and tackle the underlying reasons for it.

3.4 Case study four

The NHS help desk considered in case study four serves two acute hospitals. The help desk is open Monday - Friday from 8am to 5pm, outside of these hours calls are transferred over to the porters office who receive requests and allocate work manually; emergency calls for the Estates department are made via the Switchboard to the emergency on-call engineer. Approximately 7000 calls per month are handled by three FTE operators. Calls to the help desk are generally made by ward staff (managers, nurses) and secretaries to the clinical service unit managers.

At the time of the study the help desk took job requests for portering, housekeeping and estates work. The full range of services covered by the help desk (split by department) is shown in table 4 below.

Table 4 - List of services covered by Case study four FM help desk

Estates	Housekeeping
Access control	General cleaning
Air conditioning/ventilation	Extra theatre cleaning
Alarm maintenance	Pest control
CCTV maintenance	Spillages
Furniture repairs	Replenish supplies
Decoration	Clean toilets
Door repairs	
Drains	Porters
Electrical problems/faults	Bed transfers
Portable equipment repairs	Chair transfers
Flooring	Blood transfers
Heating problems	Emergency theatre transfers
Lifts	Note transfers
Lighting	Specimen transfers
Locks	Patient movements
Roofing	
Sinks/taps repairs	
WC/toilets	
Wheel chair defects	
Windows/glass	

Most cleaning work is done routinely, therefore housekeeping requests are mainly spillages and ad-hoc work. The help desks does not take requests for any catering/food related matters, nor any security issues. As well as the services listed above they do occasionally receive calls from

patients for information such as directions to the hospital or advice on parking, in such circumstances patients and callers are asked to contact the main hospital switchboard/reception.

The introduction of the help desk was met with resistance from various groups of staff. An example of this is illustrated from the porters; the previous system saw a supervisor based in the porters' office who would receive calls and allocate work to the porters using radios. This was described as a "logistics" based culture; if a porter was in a certain area of the hospital they would be asked to complete all the jobs for that area, regardless of priorities and whether or not there was urgent work needed in other parts of the hospital. The help desk had assisted the facilities department to shift towards a culture of "service delivery", and by using SLAs, patient care and patient movements have become the priorities.

Calls taken for either portering or housekeeping services are logged on the system and then allocated directly using the radios. Requests for estates work are also logged by the help desk operators onto the system but they do not allocate the work directly to the tradesmen. The estates department retains control of assigning their work yet they still have to meet the priorities outlined within the SLAs. When a job is completed the estates department is responsible for closing it down on the system.

The image created by the help desk is vital, not just for the facilities department, but also the Trust as a whole. The property manager describes the importance of creating a professional image:

"basically the people in here are the front line, they are the first people that staff around the Trust come into contact with and how we respond to the first telephone call, (the) initial enquiry sets the impression of the facilities directorate in total"

Again this case study shows that the staff are the biggest asset to any organisation and the key to the help desk success. Greater importance is placed upon operator knowledge of the Trust than other attributes and this suggests any new member of staff would need to be recruited internally. The case study also raises some significant issues which need to be considered concerning the culture of the groups of staff. Once more there is evidence that the porters are resistant to change, however an interesting explanation for this is provided with reference to the culture clashes. The help desk is striving to achieve a "service centred" approach, whereas the porters have a "logistics" approach. Perhaps a conclusion to draw from this is the need to consider the culture and "people" aspects just as important as getting the system and processes correct.

4.0 Conclusions

Below are the conclusions that have been drawn from the case studies, these offer examples of best practise that may contribute to a successful implementation or operation of a help desk.

4.1 Customer/Client needs

Customer needs may change over a period of time, hence the service delivered by the help desk will need to be adapted to meet these needs. This could also include keeping pace with technology, e.g. is the software flexible enough to be upgraded/modified easily.

4.2 Staffing issues

Local/site knowledge is important and crucial for help desk operators. This includes an awareness of service activities. In part appropriate recruitment and retention strategies are the building block to attaining operators who would have the relevant knowledge. The staff training programme should be linked to and match the purpose and mission of the help desk. Staff should not be put on the help desk without the required knowledge and personal skills to convey the required professional image.

When implementing the help desk is it important to understand the different groups of staff involved. What resistance to change will be encountered and where from? The example given in case study four illustrated that it was the hospital porters who were opposed to the implementation of the help desk. The problem originated from a clash of cultures. Case study four also demonstrated that involving the porters at all stages helped to overcome potential resistance.

4.3 Working environment

The location and image of the help desk should reflect its importance. As is demonstrated in case study one and case study four. Case study one describes their help desk "*as the flagship within the organisation*". The help desk in case study four is located next to the main hospital reception and means that everyone who enters the building notices the office. Consequently the environment in which the help desk is situated must support its professional image.

4.4 Client communication

As demonstrated by earlier help desk research (Price & Clark, 2000) the most important customer requirement surrounds communication, i.e. being informed of delays. Therefore there needs to be a robust procedure in place for the porters and tradesmen to feedback any delays or problems in completing the job. There should also be a documented procedure for handling and resolving complaints.

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