MetricNet's Online Data Submission Portal

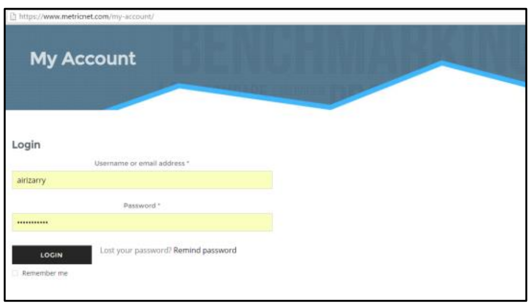
User Guide

1. MetricNet will send an email to the primary contact with login credentials immediately after the project kickoff meeting.

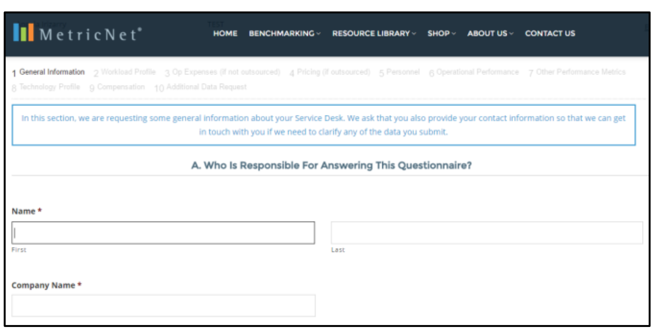
   a. Login credentials will be unique to the service desk, desktop support group or call center being benchmarked. If multiple locations are being separately benchmarked, each location will be provided a unique set of login credentials.

   b. If you do not receive this email within 1 hour of your project kick-off meeting, please notify us at info@metricnet.com.

2. Login to your account at https://www.metricnet.com/my-account



3. Navigate to the data submission portal at https://www.metricnet.com/data-collection



4. The data submission portal includes 10 unique sections. Each section should be completed on a best efforts basis before submitting your data.

   a. **Section 1 – General Information:** We are requesting some general information about your Service Desk. We ask that you also provide your contact information so that we can get in touch with you if we need to clarify any of the data you submit.

      i. Some fields are required. If a required field is not answered, you will receive a warning that looks like this:

         There was a problem with your submission. Errors have been highlighted below.

         The field that was missed will also be highlighted in red:

         Is this Service Desk in more than one location? *

         Please Answer Yes or No

         This field is required.

   b. **Section 2 – Workload Profile:** We are requesting some general information about the services provided and the contacts and incidents handled by your Service Desk. Please note that the questionnaire asks for separate information about inbound and outbound contacts, including contact channels, contact types, and contact volumes.

   c. **Section 3 – Operational Expenses:** We are requesting information on the operating expenses for your Service Desk. Ideally, you should enter a full year’s expenses. However, if unexpected events (e.g., mass hiring and training, or a major change in work responsibilities) increased your costs over the last year, you may choose to select cost data for a more representative time period, and annualize it. For example, you might select your expenses for the first three months of 2016, and multiply that by four to get the annual run rate on your operating expenses. Please be sure to match the headcount that you report in the next section to the cost data you provide. To continue with our example, if you report expenses based on the first three months of 2016, the average headcount that you report should also be for the first three months of 2016.

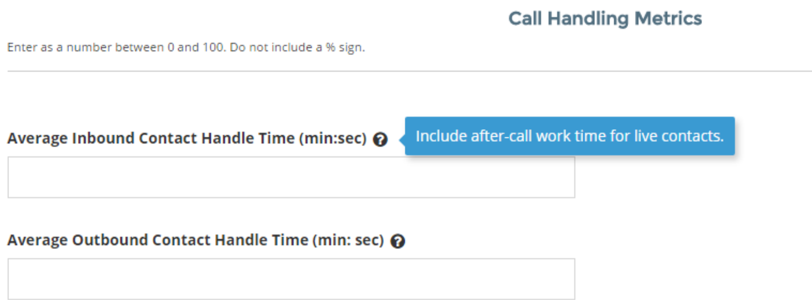
d. **Section 4 – Pricing:** If any part of your Service Desk is outsourced, we are requesting information on the pricing mechanism for outsourced contacts, the amount paid to the outsourcer, and the contact profile for the amount paid (location, languages, contact volumes, etc.).

e. **Section 5 – Personnel:** We are requesting your personnel headcount. Please be sure to report headcount figures corresponding to the period of time for which you reported operating expenses. If headcount fluctuated during that period (a common occurrence), please report the average headcount. For example, if reporting expenses for the first quarter of 2016, the headcount reported should also be for the first quarter of 2016. If you had 25 full-time agents during the first month, 30 full-time agents during the second month, and 35 full-time agents during the final month of the quarter, the agent headcount you should report would be 30, the average for the quarter.

   It is also important that you report only full time equivalent (FTE) headcount figures. If you have an agent, for example, that spends half time doing customer support, and half time doing QA/QC work, you would report 0.5 FTE's in the agent tally, and 0.5 FTE's in the QA/QC tally. Please be careful not to double count any personnel. If a person has multiple jobs on the Service Desk, their time should be allocated proportionally to the job categories specified below. It's okay (and quite common) to report fractional headcounts. Finally, you should distinguish between company employees and contractors, and report headcount totals separately for these two classifications of workers.

f. **Section 6 - Operational Performance:** We are requesting information on a number of performance metrics. Please provide average performance levels for each metric. Ideally, you should provide data for a one-year period. However, if your performance during part of the year suffered due to events beyond your control (e.g., a company merger, Service Desk consolidation, etc.), you may report performance averages for a more representative time period (e.g., the first quarter of 2016). Much of the data requested is in units of percent. In those fields, please report percent in whole numbers, plus one place past the decimal if possible. For example, a 4.7% call abandonment rate should be reported as 4.7, NOT as 0.047.

i. Hover tool tips are provided throughout this section:



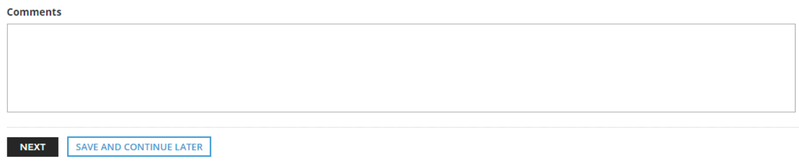
g. **Section 7 – Other Performance Metrics:** We are requesting information on any additional performance metrics tracked by your Service Desk. Ideally, you should provide average data for a one-year period. However, if your performance during part of the year suffered due to events beyond your control (e.g., a company merger, Service Desk consolidation, etc.), you may report performance averages for a more representative time period (e.g., the first quarter of 2016).

h. **Section 8 - Technology Profile:** We are requesting information about the technology used by your Service Desk.

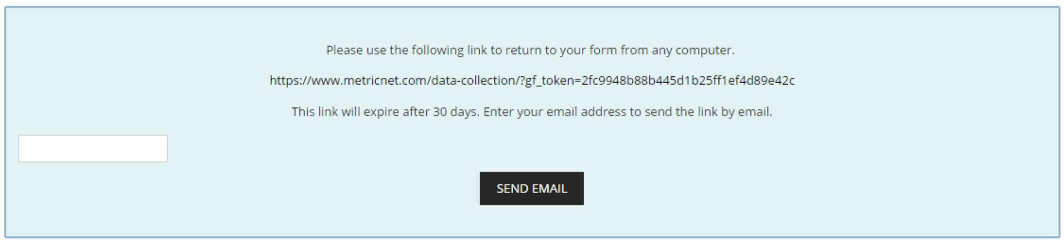
i. **Section 9 – Compensation:** We are requesting information on how your Service Desk personnel are compensated. For each job category listed, please provide the average annual base salary, and the average annual bonus and incentive compensation.

j. **Section 10 – Additional Data Request:** Here you can upload additional documentation as attachments. For example: High level work flow diagrams and descriptions in PDF format.

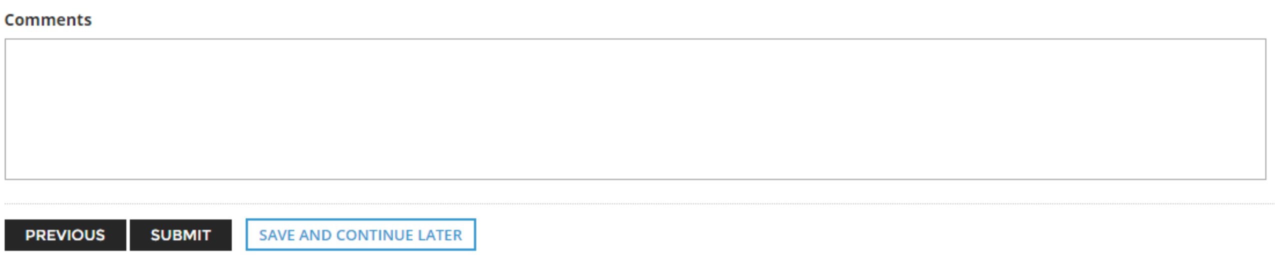
5. At any time, you may save and continue by clicking the save and continue later button at the bottom of the page:



a. You will be provided a unique link to return to the form at a later date. Copy this link and request to have it emailed to you by adding your email to the entry box and clicking the SEND EMAIL button.



6. When each section is completed on a best-efforts basis, please click the SUBMIT button that appears at the bottom of section 10.



7. Once you have completed and submitted the data submission form, please navigate to the Process Assessment at https://www.metricnet.com/process-assessment/