



SERVICE MANAGEMENT WORLD

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SERVICE MANAGEMENT WORLD

**From Good to Great – The Emory
Healthcare Success Journey!**

Your Speaker: Jeff Rumburg

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Download Two KPI eBooks & Today's Presentation

 	 
<p>Service Desk KPIs Definitions & Correlations</p> 	<p>Desktop Support KPIs Definitions & Correlations</p> 
<p>Learn how each of the Service Desk metrics that we benchmark is defined, why it's important, and how it correlates with other metrics. We include metrics from the following six categories:</p> <ul style="list-style-type: none"> > Cost > Productivity > Service Level > Quality > Agent > Contact Handling <p>MetricNet Performance Benchmarking www.metricnet.com 703.992.8160 info@metricnet.com</p>	<p>Learn how each of the Desktop Support metrics that we benchmark is defined, why it's important, and how it correlates with other metrics. We include metrics from the following seven categories:</p> <ul style="list-style-type: none"> > Cost > Productivity > Service Level > Quality > Technician > Ticket Handling > Workload <p>MetricNet Performance Benchmarking www.metricnet.com 703.992.8160 info@metricnet.com</p>

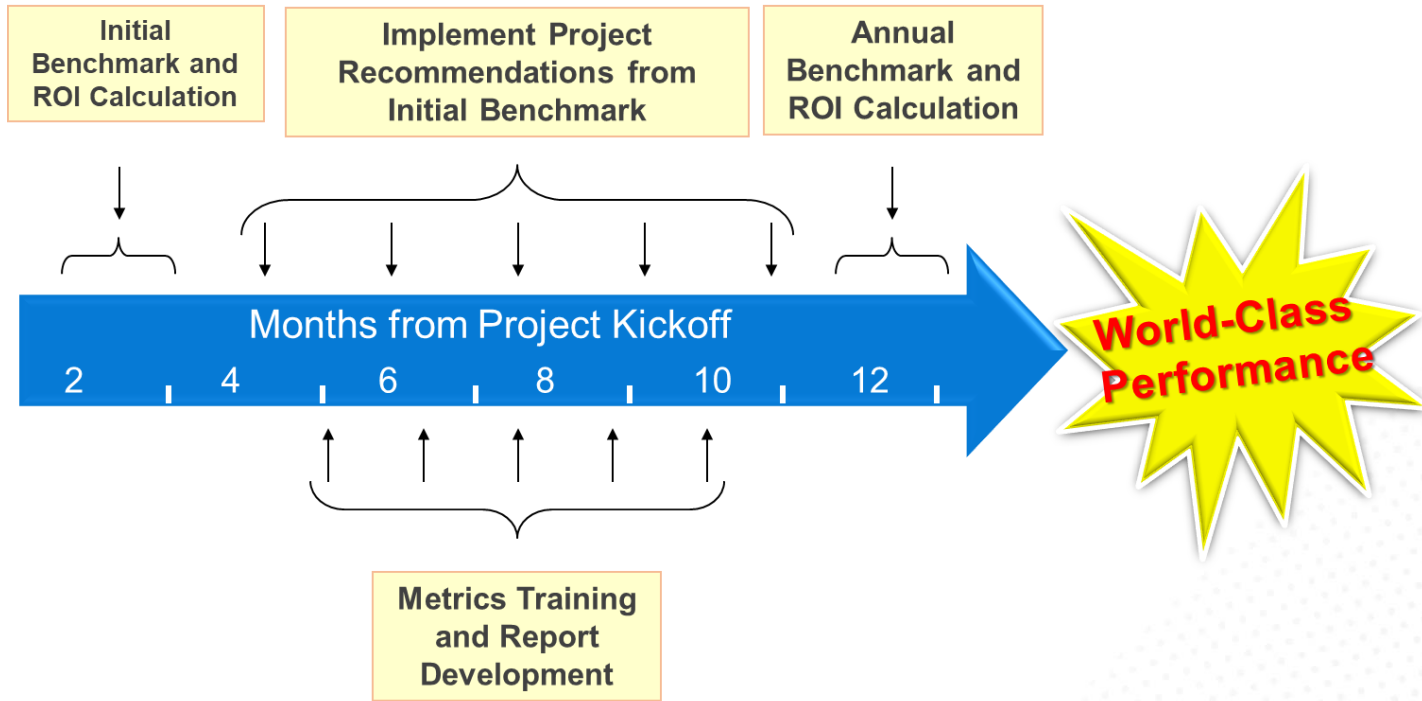


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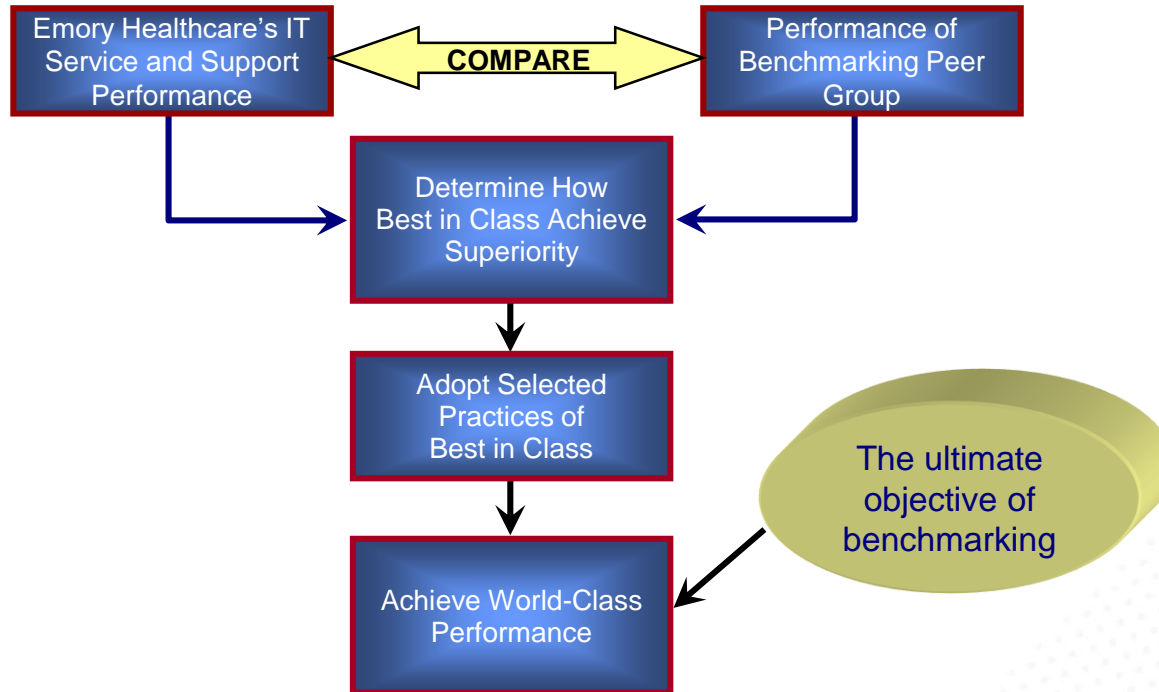
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The One Year Path to World-Class Performance



The Benchmarking Methodology

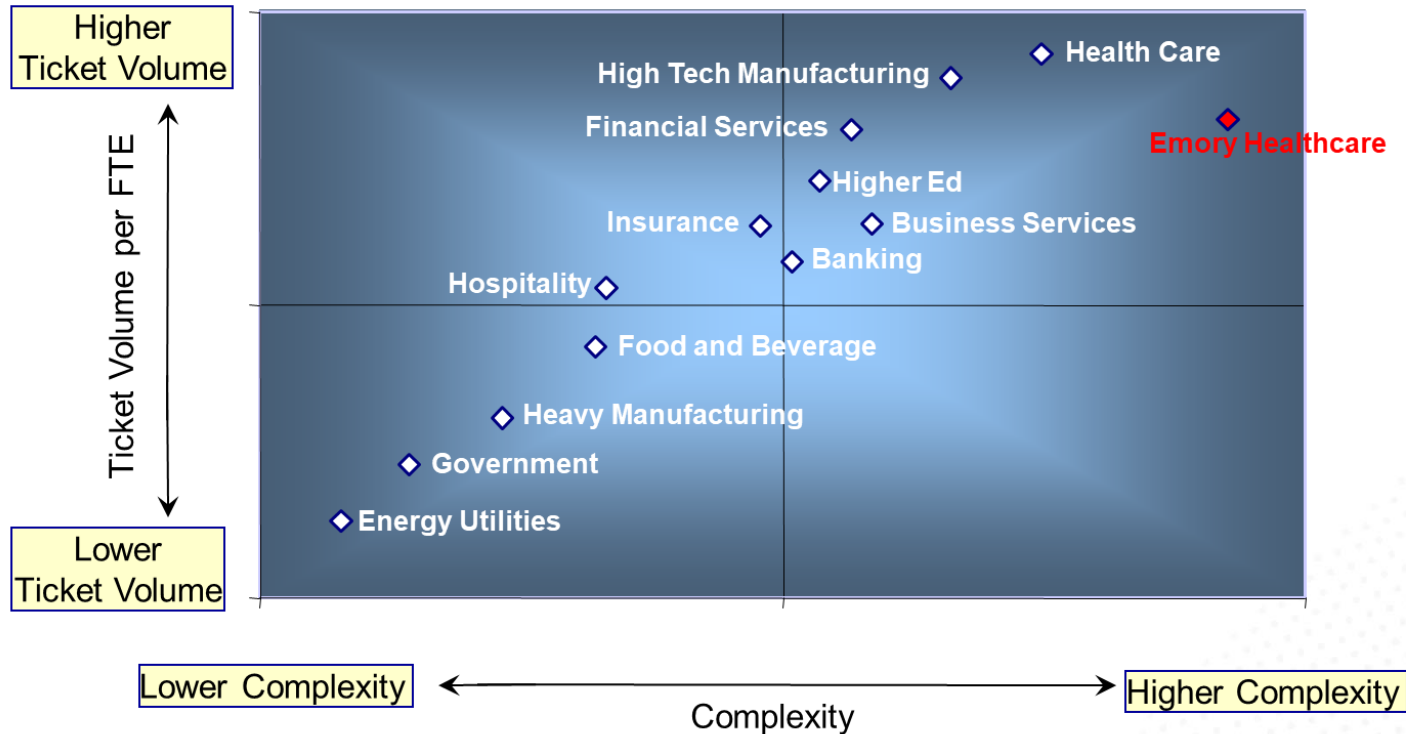


Project Goal: World-Class IT Service and Support

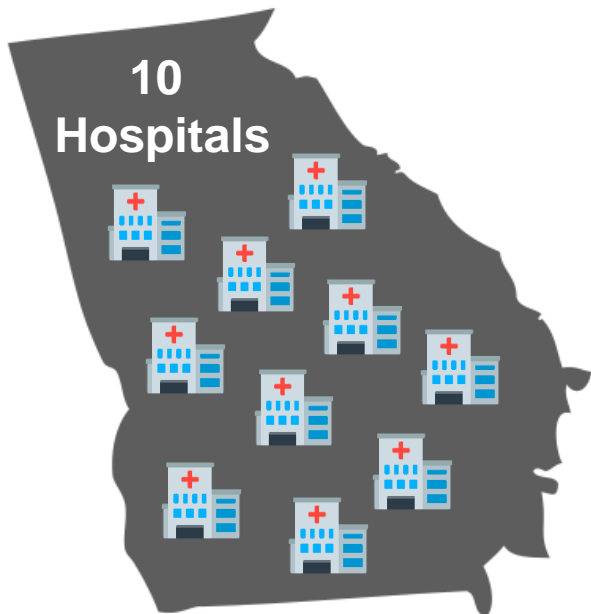
- Service consistently exceeds customer expectations
 - Result is high levels of Customer Satisfaction
 - Top Quartile Customer Satisfaction
- Costs are managed at or below industry average levels
 - Cost per Ticket below average
 - Bottom quartile Cost per Ticket
- Service and Support follow industry best practices
 - Practices and Procedures are well defined and well documented
 - Service and Support follows industry best practices
- Every transaction adds value
 - A positive customer experience
 - Creates ROI > 100%

The Initial State

Complexity vs. Ticket Volume



Emory Healthcare at a Glance



2,673 Beds



250 Locations

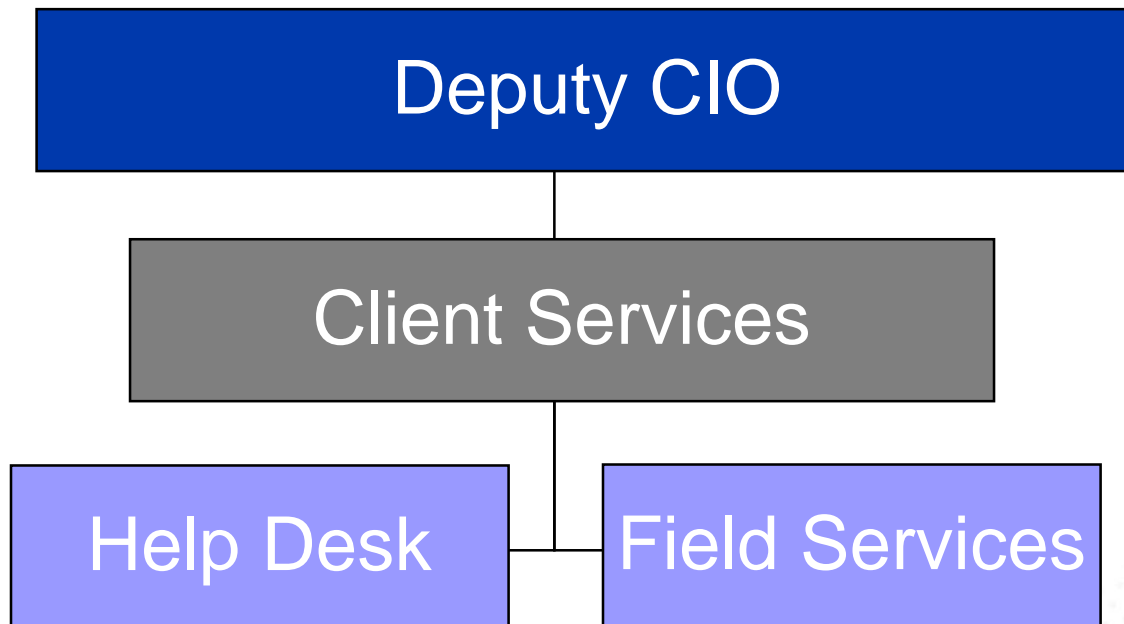


2,800 Physicians



21,000 Employees

Scope of the Initiative



Emory's IT Service and Support Overview

Metric	Service Desk	Field Services
Location	Atlanta, GA	Atlanta, GA • Remote sites
Hours of Operation	24 X 7	6 AM – 6 PM, Monday – Friday
Annual Operating Expense	\$1,694,669	\$3,824,425
Monthly Ticket Volume	14,569	3,361
Technician Headcount.	22	32

Service Desk Benchmarking Metrics

Cost

- Cost per Inbound Contact
- Cost per Minute of Inbound Handle Time
- Net First Level Resolution Rate

Productivity

- Inbound Contacts per Technician per Month
- Outbound Contacts per Technician per Month
- Technician Utilization
- Technicians as a % of Total Headcount

Service Level

- Average Speed of Answer (ASA)
- % of Calls Answered in 30 Seconds
- Call Abandonment Rate

Quality

- Call Quality
- Net First Contact Resolution Rate
- Customer Satisfaction

Technician

- Annual Technician Turnover
- Daily Technician Absenteeism
- Technician Occupancy
- Schedule Adherence
- New Technician Training Hours
- Annual Technician Training Hours
- Technician Tenure (months)
- Technician Job Satisfaction

Contact Handling

- Inbound Contact Handle Time (minutes)
- Outbound Contact Handle Time (minutes)
- Inbound Contacts as a % of Total Contacts
- User Self-Service Completion Rate

Field Services Benchmarking Metrics

Cost

- Cost per Ticket
- Cost per Incident
- Cost per Service Request

Quality

- Customer Satisfaction
- Incident First Visit Resolution Rate
- % Resolved Level 1 Capable

Workload

- Tickets per User per Month
- Incidents per User per Month
- Service Requests per User per Month
- Incidents as a % of Total Ticket Volume

Productivity

- Tickets per Technician per Month
- Incidents per Technician per Month
- Service Requests per Technician per Month
- Technicians as a % of Total Headcount
- Technician Utilization

Technician

- Annual Technician Turnover
- Daily Technician Absenteeism
- New Technician Training Hours
- Annual Technician Training Hours
- Technician Tenure (months)
- Technician Job Satisfaction

Service Level

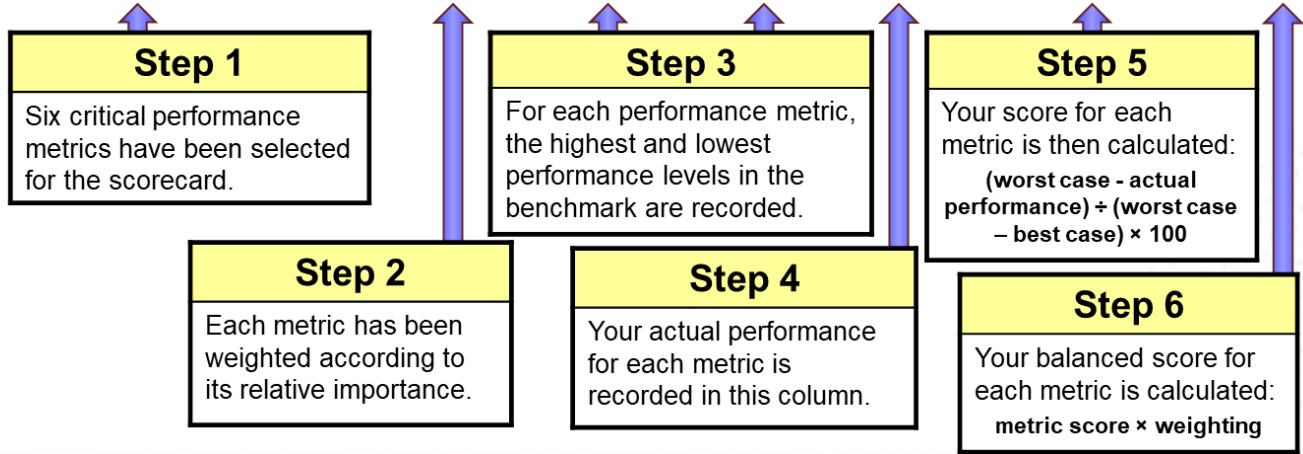
- Mean Time to Resolve Incidents (business hours)
- % of Incidents Resolved in 8 Business Hours
- Mean Time to Fulfill Service Requests (business days)
- % of Service Requests Fulfilled in 24 Business Hours

Ticket Handling

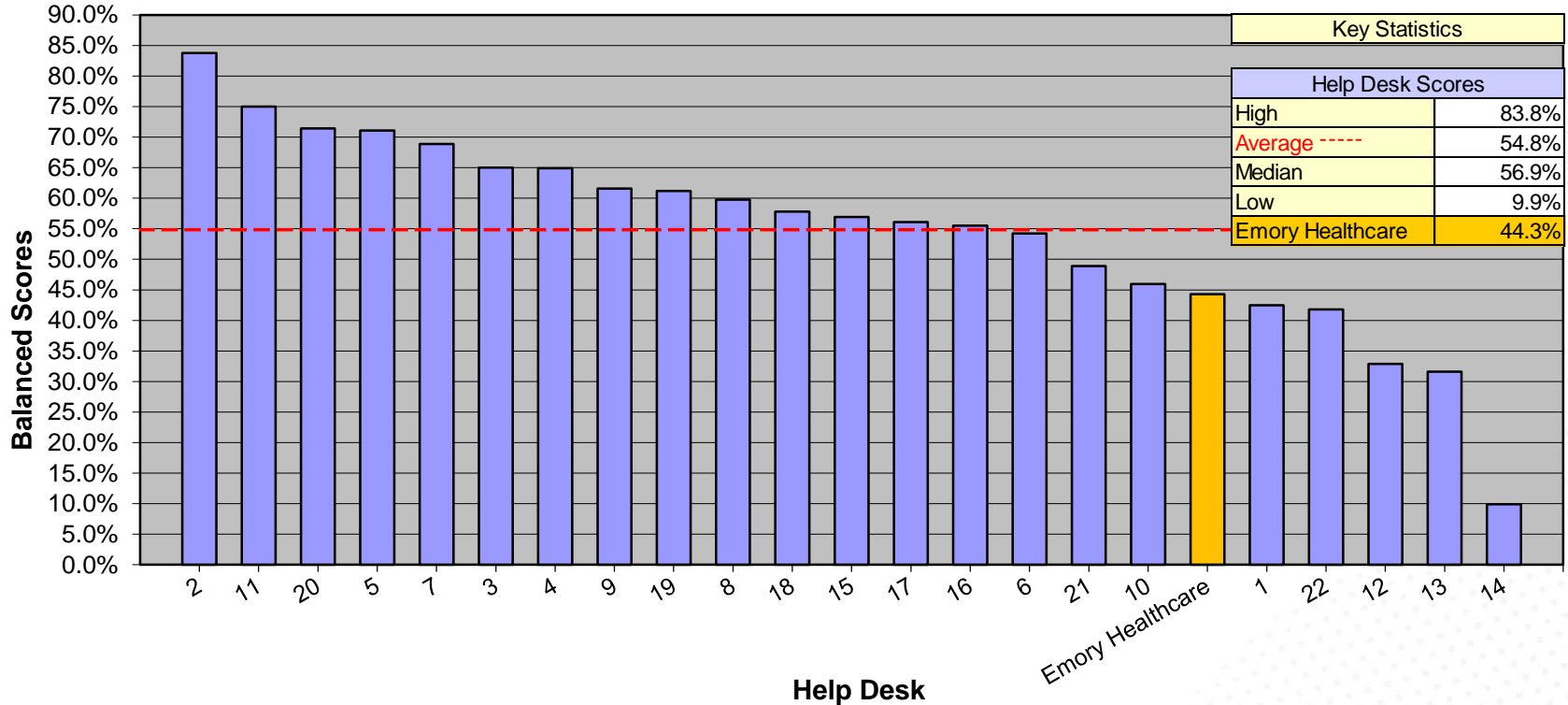
- Average Incident Work Time (minutes)
- Average Service Request Work Time (minutes)
- Average Travel Time per Ticket (minutes)

Initial EHC Help Desk Balanced Scorecard

Performance Metric	Metric Weighting	Performance Range		EHC 2017	Metric Score	Balanced Score
		Worst Case	Best Case			
Cost per Inbound Contact	25.0%	\$19.95	\$8.17	\$9.69	87.1%	21.8%
Customer Satisfaction	25.0%	72.4%	97.8%	89.6%	67.7%	16.9%
Agent Utilization	15.0%	30.8%	57.8%	30.8%	0.0%	0.0%
Net First Contact Resolution Rate	15.0%	58.0%	77.3%	58.0%	0.0%	0.0%
Agent Job Satisfaction	10.0%	63.6%	90.6%	78.7%	55.9%	5.6%
Average Speed of Answer (seconds)	10.0%	146	26	146	0.0%	0.0%
Total	100.0%	N/A	N/A	N/A	N/A	44.3%



Initial EHC Help Desk Balanced Scorecard Summary



Initial EHC Field Services Balanced Scorecard

Performance Metric	Metric Weighting	Performance Range		Your Actual Performance	Metric Score	Balanced Score
		Worst Case	Best Case			
Cost per Ticket	25.0%	\$150.85	\$64.25	\$94.83	64.7%	16.2%
Customer Satisfaction	25.0%	59.5%	97.2%	92.1%	86.5%	21.6%
Tickets per Technician per Month	15.0%	70.1	126.6	105.0	61.8%	9.3%
Mean Time to Resolve Incidents (business hours)	15.0%	15.50	4.20	15.47	0.3%	0.0%
Mean Time to Fulfill Service Requests (business days)	10.0%	8.50	2.70	5.37	54.0%	5.4%
Technician Job Satisfaction	10.0%	68.3%	84.3%	77.2%	55.3%	5.5%
Total	100.0%	N/A	N/A	N/A	N/A	58.0%

Step 1
Six critical performance metrics have been selected for the scorecard.

Step 2
Each metric has been weighted according to its relative importance.

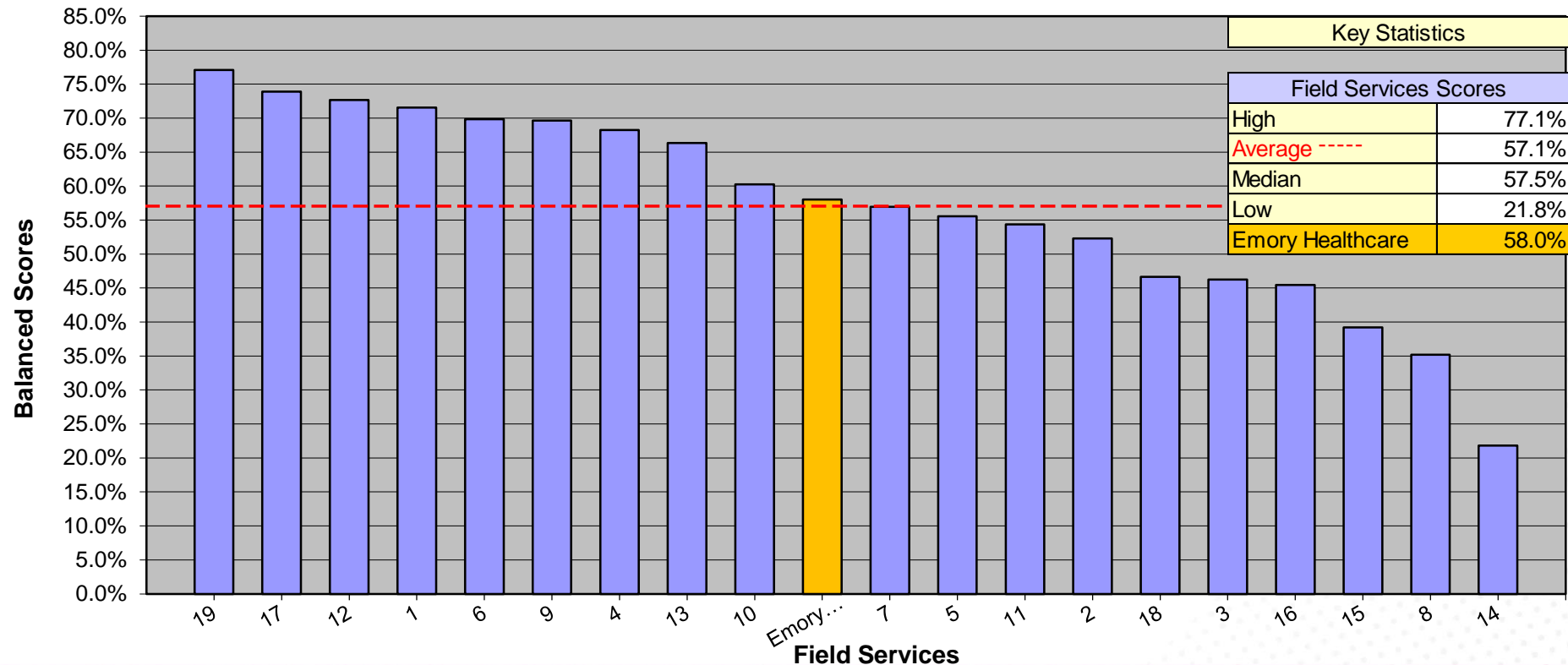
Step 3
For each performance metric, the highest and lowest performance levels in the benchmark are recorded.

Step 4
Your actual performance for each metric is recorded in this column.

Step 5
Your score for each metric is then calculated:
 $(\text{worst case} - \text{actual performance}) \div (\text{worst case} - \text{best case}) \times 100$

Step 6
Your balanced score for each metric is calculated:
 $\text{metric score} \times \text{weighting}$

Initial EHC Field Services Balanced Scorecard Summary



Client Services Faced a Number of Challenges

- The metrics discipline was weak
 - Some important KPIs were not being tracked – e.g., Customer Satisfaction, Cost per Ticket, MTTR, and Agent Satisfaction
- ITIL Disciplines were weak and unmanaged
 - Incident, Problem, and Knowledge Management were immature
- Initial troubleshooting was sometimes minimal or non-existent before a ticket was escalated to a resolver group
- There is a lot of “bypass”, e.g., customers going directly to resolver groups for support
- Lines of demarcation between client services and other support groups are not well defined
 - The result was a lack of accountability

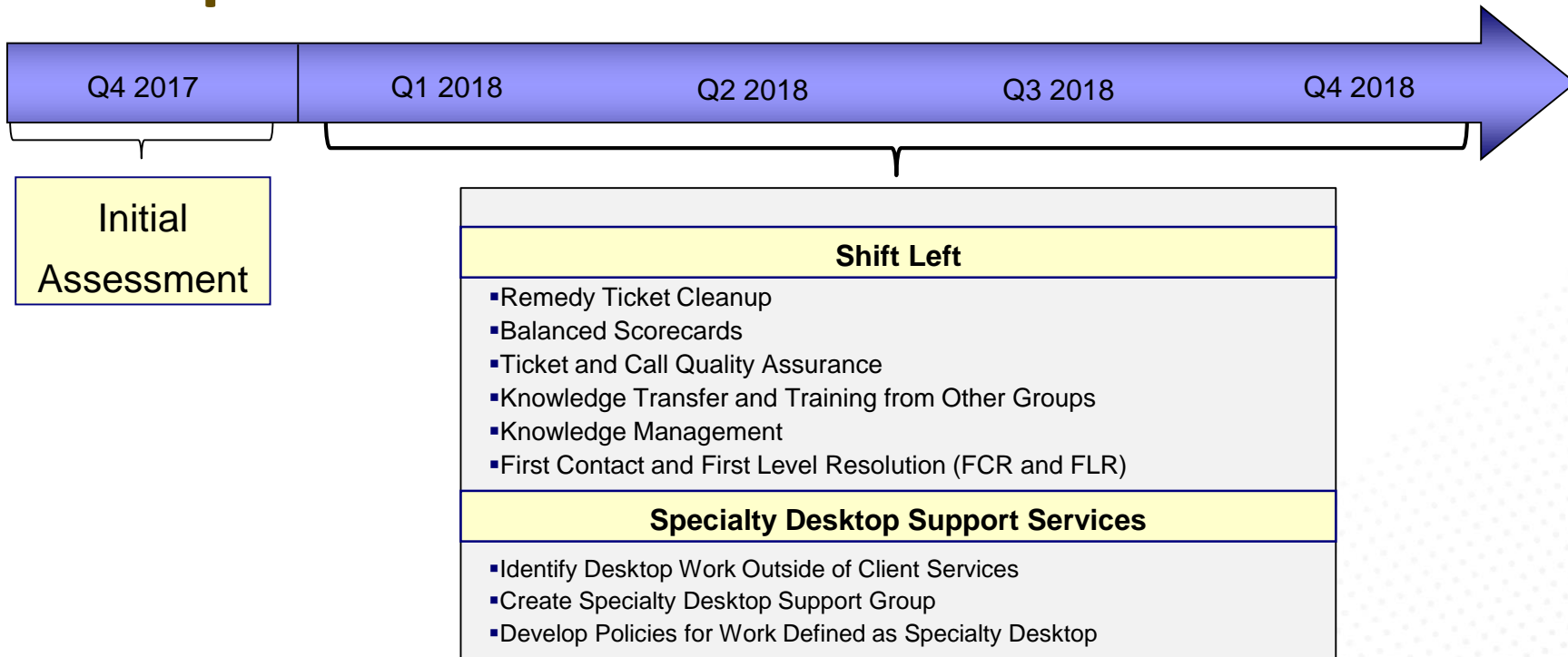
Recommendations were Made

- Move work closer to the customer
 - Shift left
 - Specialty Desktop Support Team
 - Rounds relaunch
- Mature core service management processes
 - Incident, Change, and Problem Management

- Introduce and mature key disciplines
 - Metrics and Reporting
 - Incident Management
 - Knowledge Management
 - Problem Management
 - Workforce Management

The Continuous Improvement Phase

Implementation of Client Services Goals



Shift Left Reduces Total Cost of Ownership

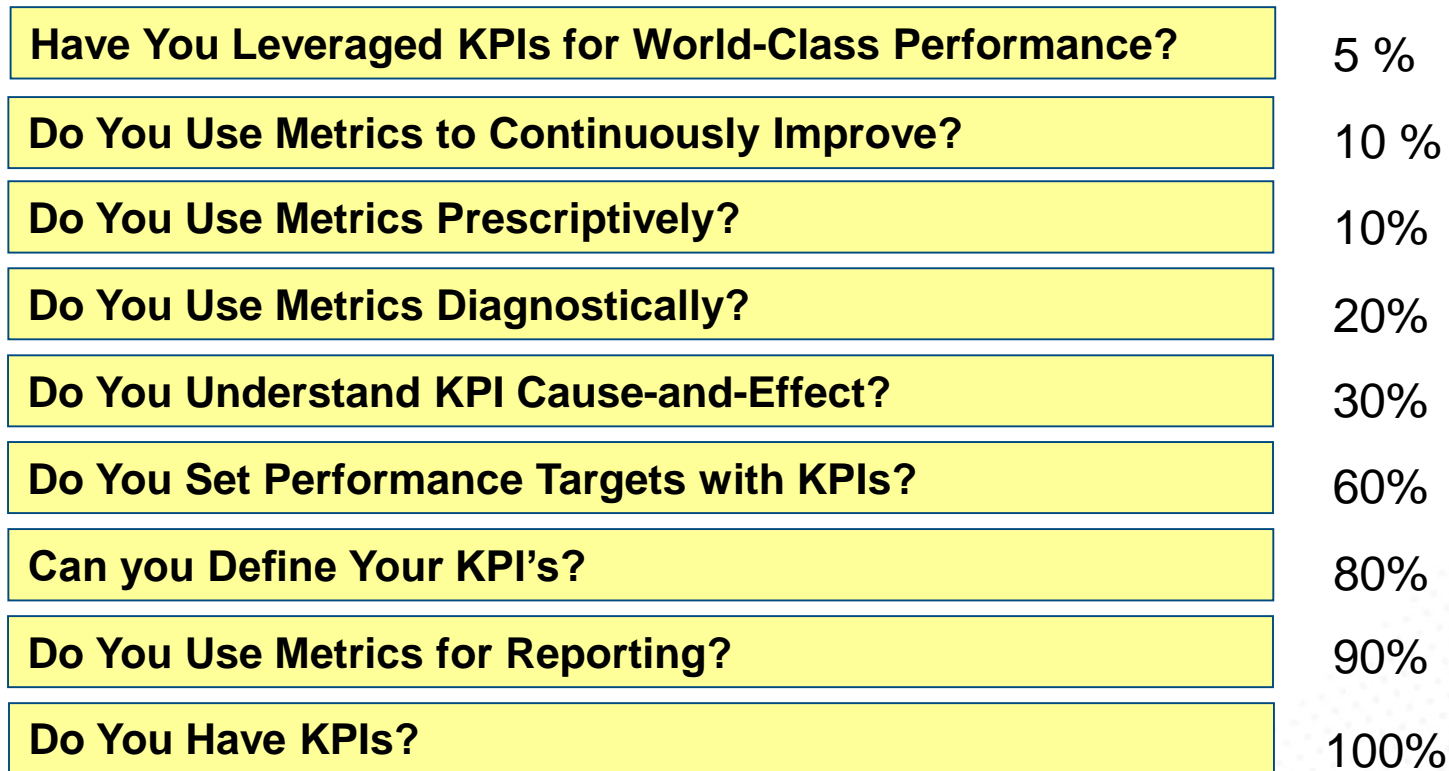
Support Level



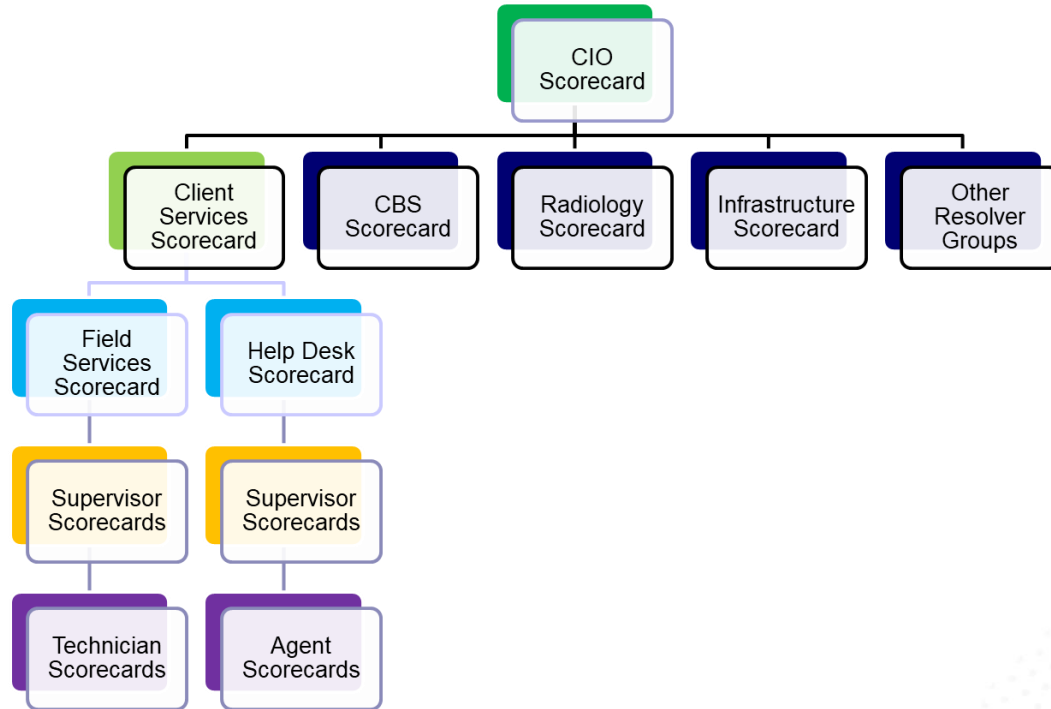
Key Initiatives

- Mature the Metrics Discipline
- Implement Scorecards
- Clean up the Remedy ticket backlog
- Implement a Ticket Quality Monitoring Program
- Mature Incident Management, and Hire an Incident Manager
- Mature Problem, and Knowledge Management
- Stand Up Specialty Desktop Support

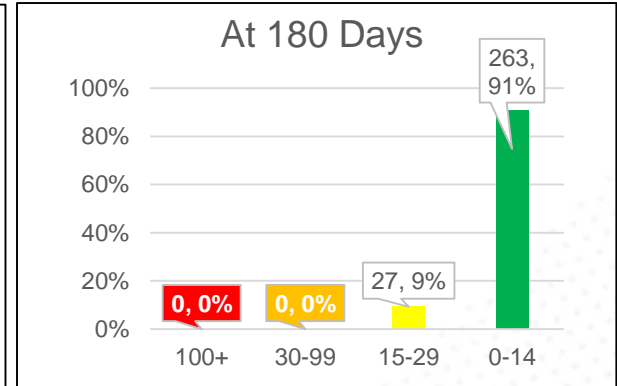
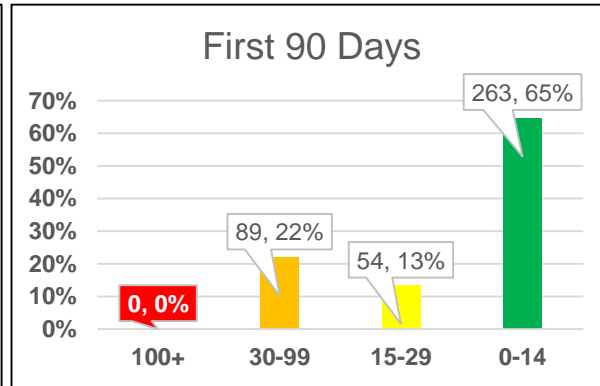
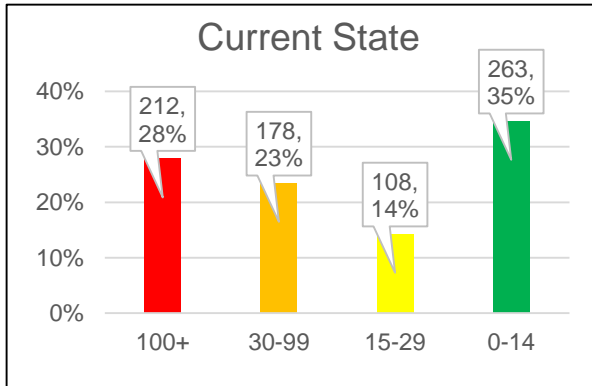
Maturing the Metrics



The Emory Healthcare Scorecard Framework



Proposed Goals for Remedy Ticket Cleanup – Non Client Services



Steady State (> 180 Days)

Zero red tickets (100+ Days) | Zero orange tickets (30-99 Days) | Yellow tickets reduced by 75% (15-29 Days)

Ticket Quality Monitoring

INCIDENT/IT SERVICE MANAGEMENT - Incident Management
Incident Interface Update/Query

Search Input Field Values

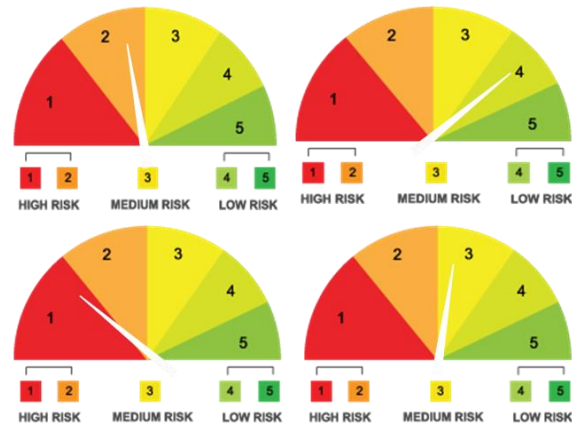
Incident Number* INC00000000105
 zTD Action
 SFRS Integration Fields
 zTD_Command
 zTempDevzSID
 SFRS Registry Instance ID
 SRID
 SFRMSAD01uid
 TemplateID
 SRInstanceID

Modify/Query Fields

First Name* jpp-admin Middle Name
 Last Name* jpp-admin
 Description CPU Utilization is 32.76%, taken below-normal
 Status Resolved
 Impact >Moderate/Limited
 Urgency >Medium
 Priority Medium
 Weight 10
 Service Type Infrastructure Event
 Status_Reason Automated Reprovision Req
 Details Ticket updated by Oracle
 Enterprise Manager Remote Service Desk Connector
 Reported Source System Management
 Reported Date* 08/20/08 5:08:01 PM
 Company* Internal
 Region America
 Site Group Houston

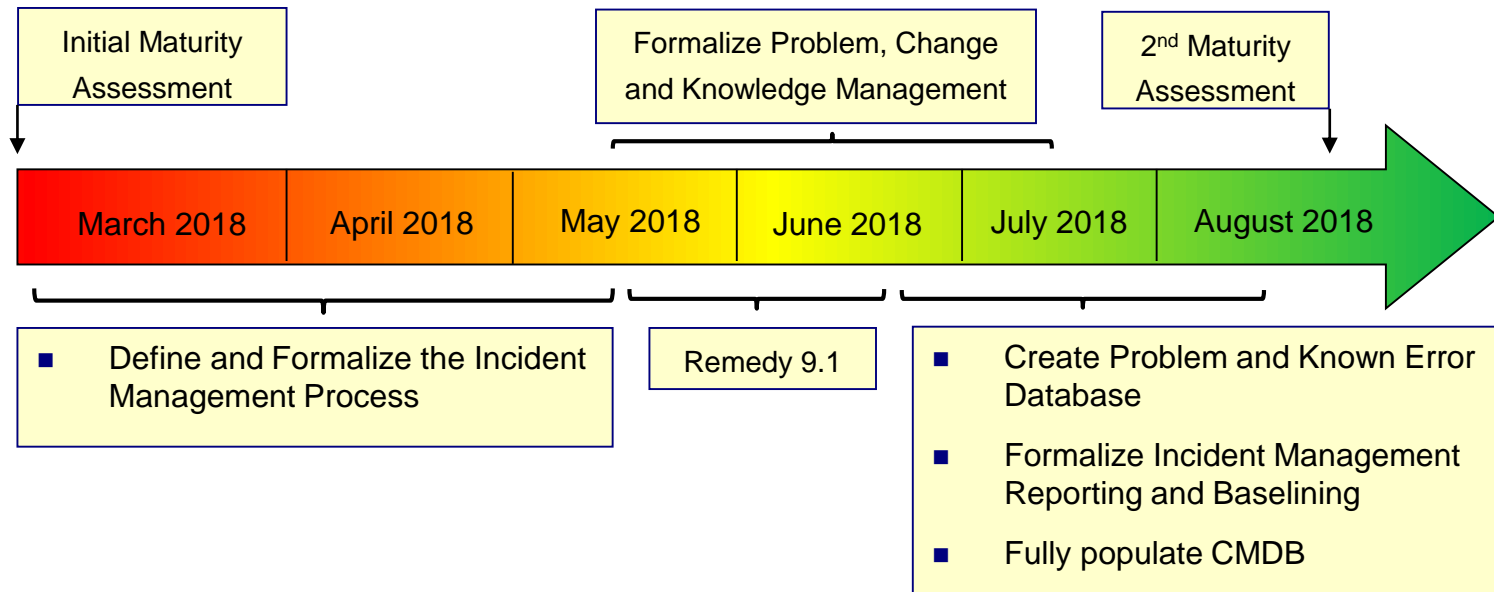
Instance# A00142259308E9YC

zTD_Summary

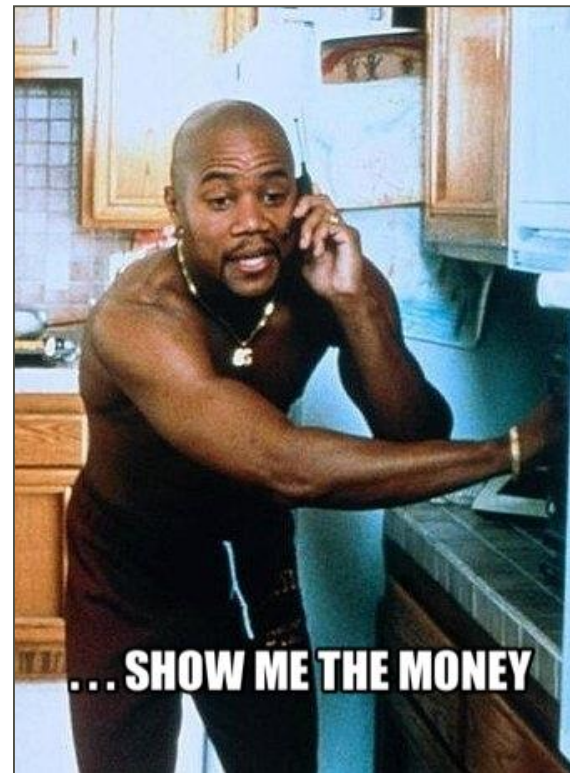


Ticket Quality Measure	Goal	Actual
Complete Customer Contact Information Provided	5	4
Customer incident or request is fully described	5	3
Information on resolution or attempted resolution is clear and comprehensive	5	4
Ticket resolved or escalated to information is provided	5	2
Knowledge article is referenced or created	5	1
Overall Completeness and Quality of Ticket	5	2.8
Supervisor Comments		

Implementing and Maturing ITIL Processes

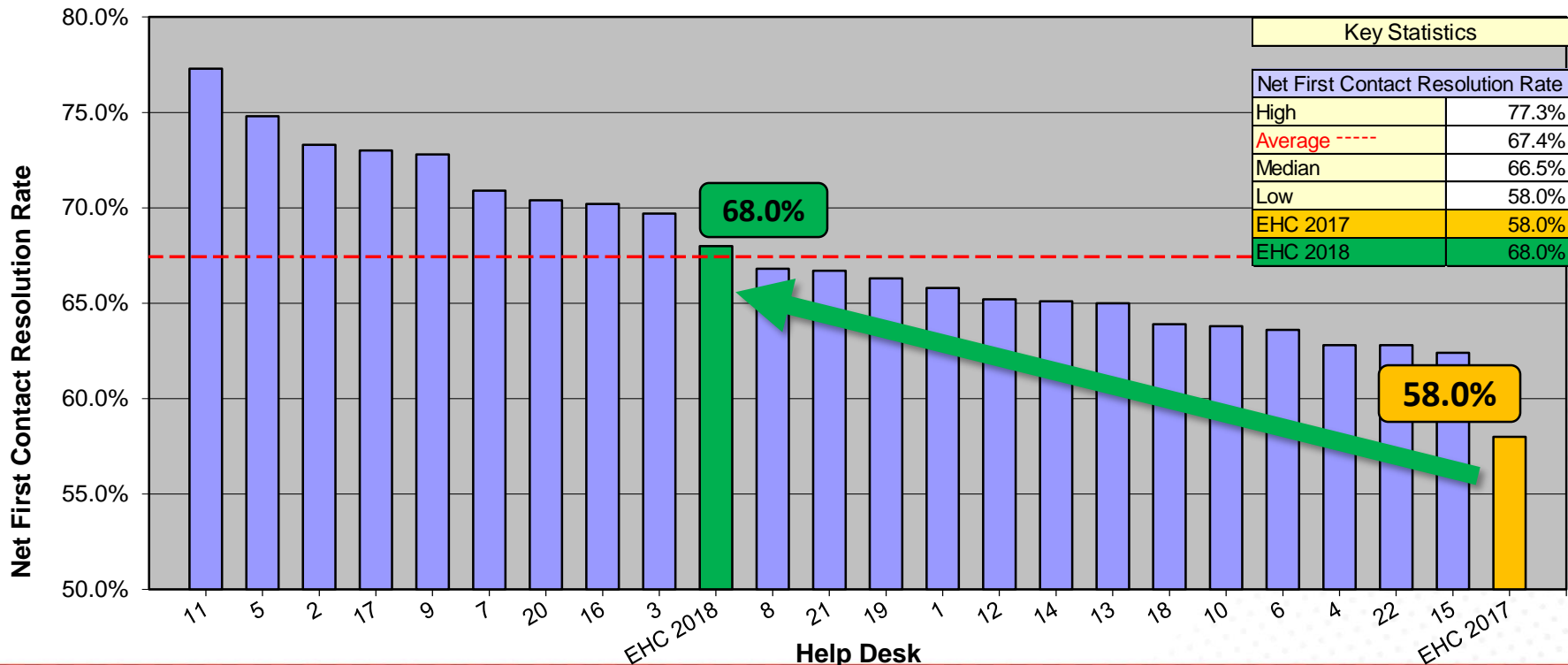


Show Me the Money!

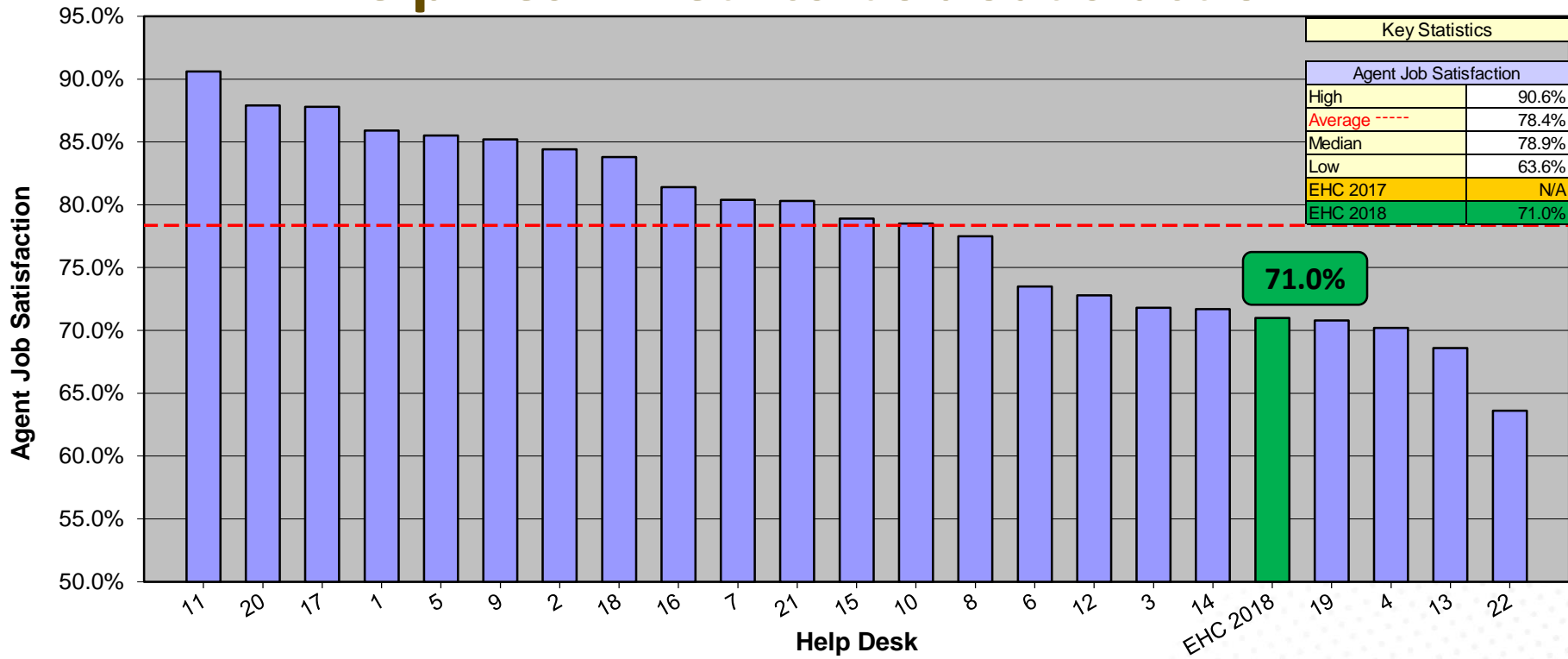


The Results: One Year Later

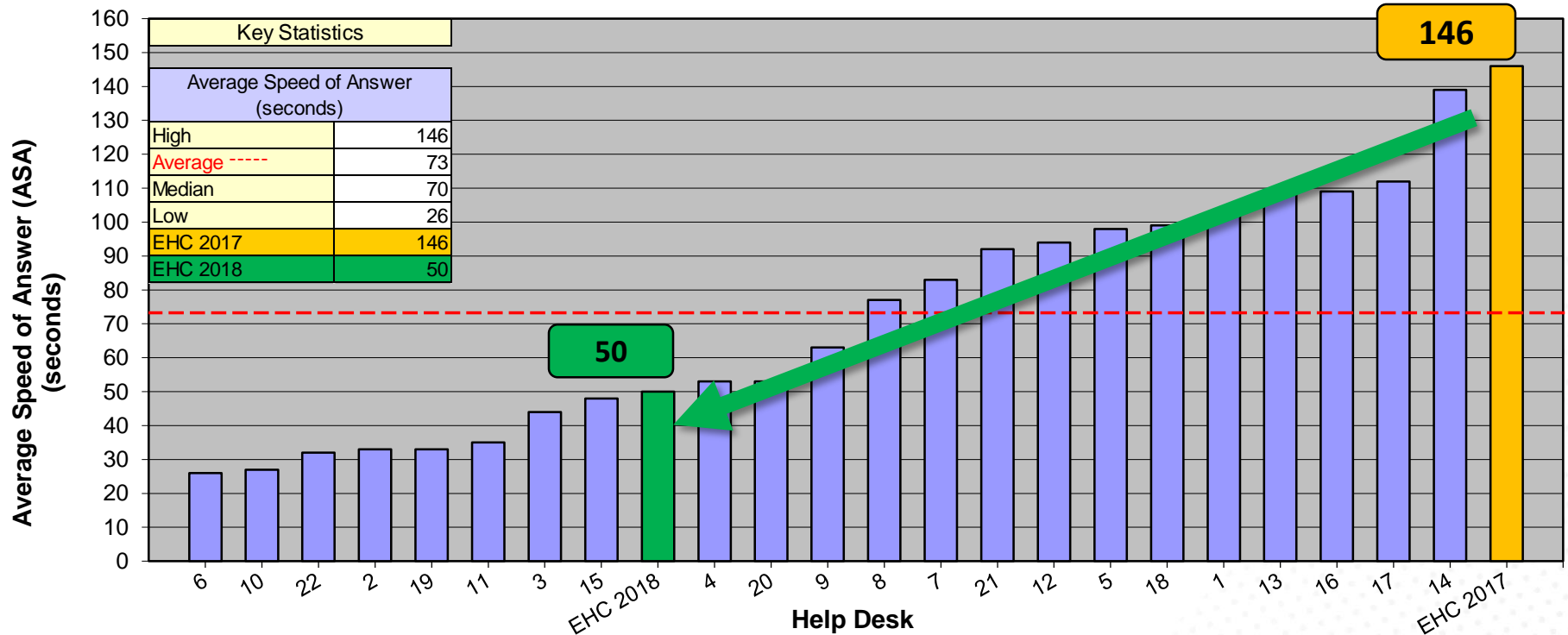
Help Desk Metrics: First Contact Resolution



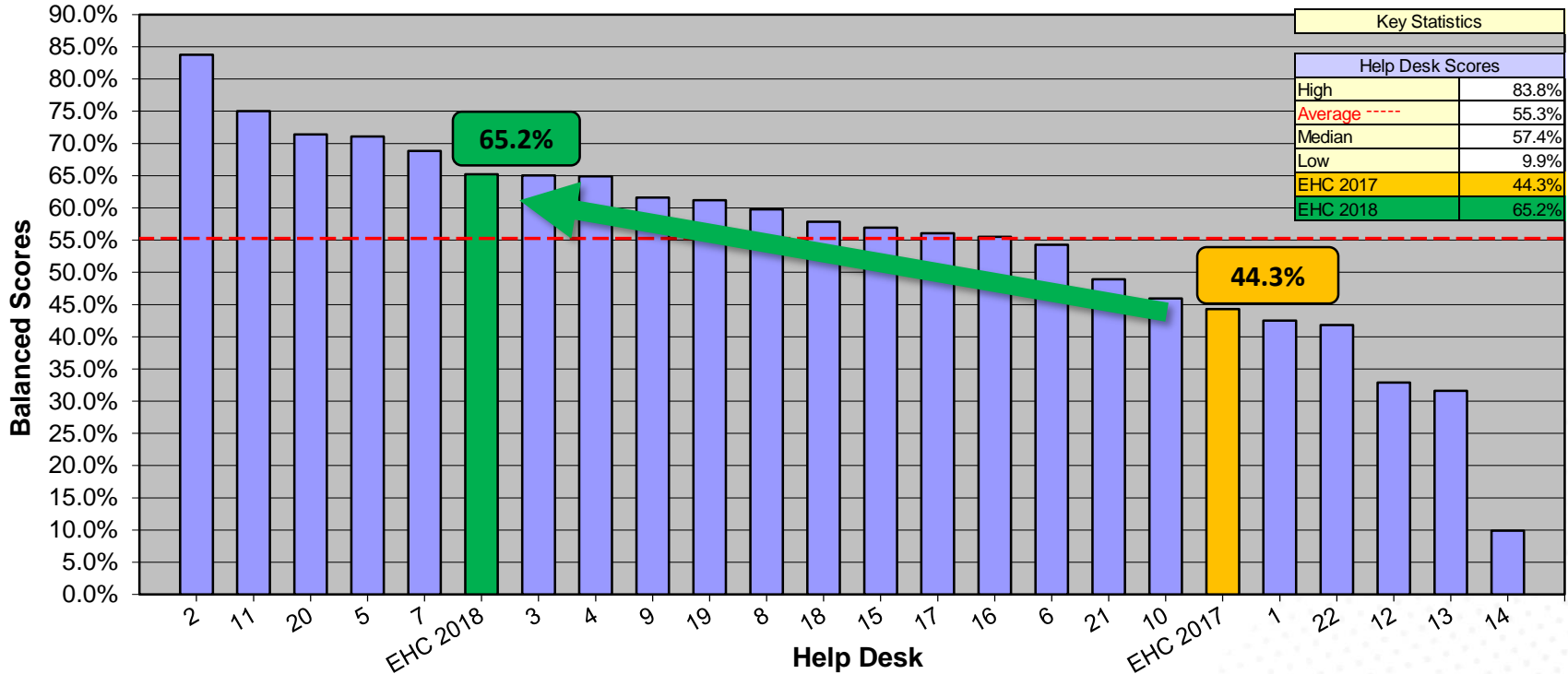
Help Desk Metrics: Job Satisfaction



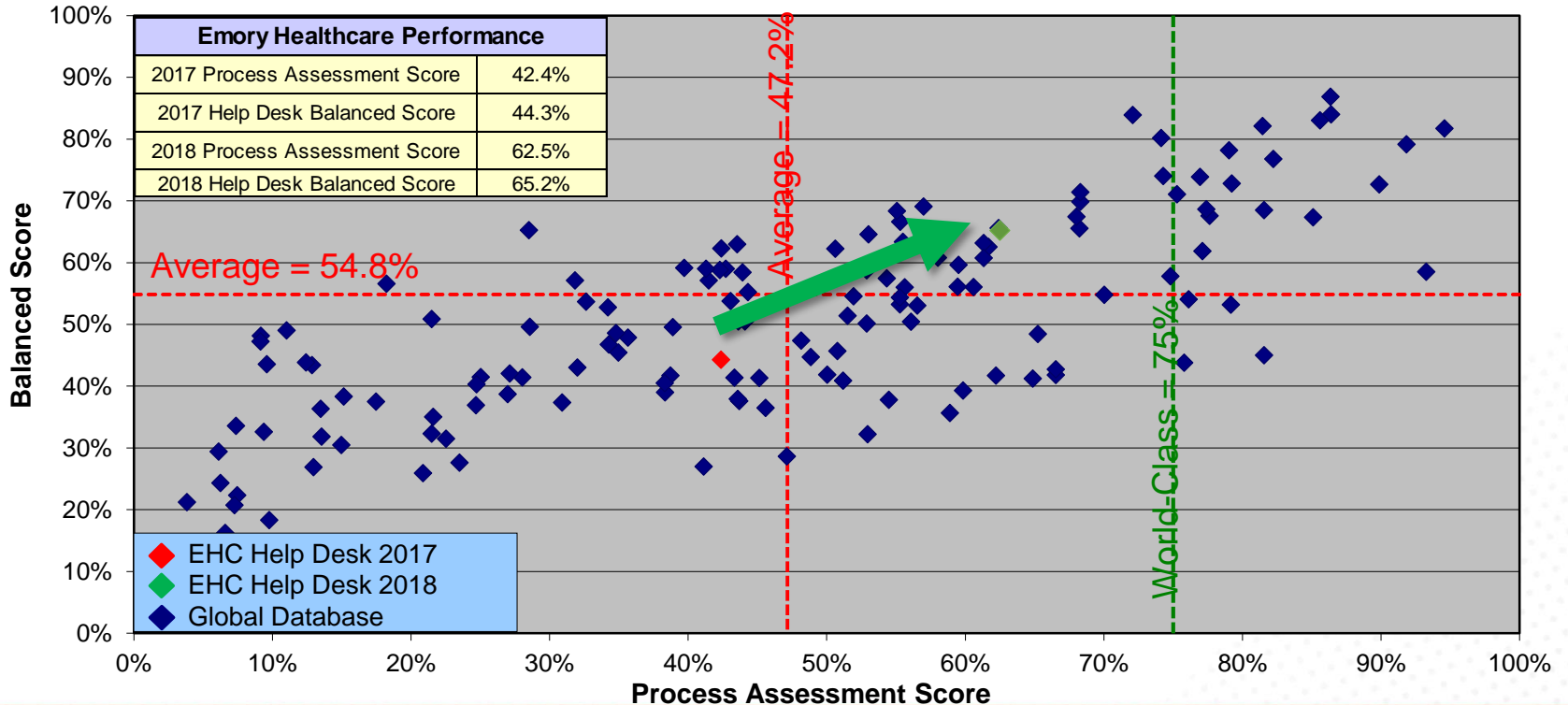
Help Desk Metrics: Average Speed of Answer



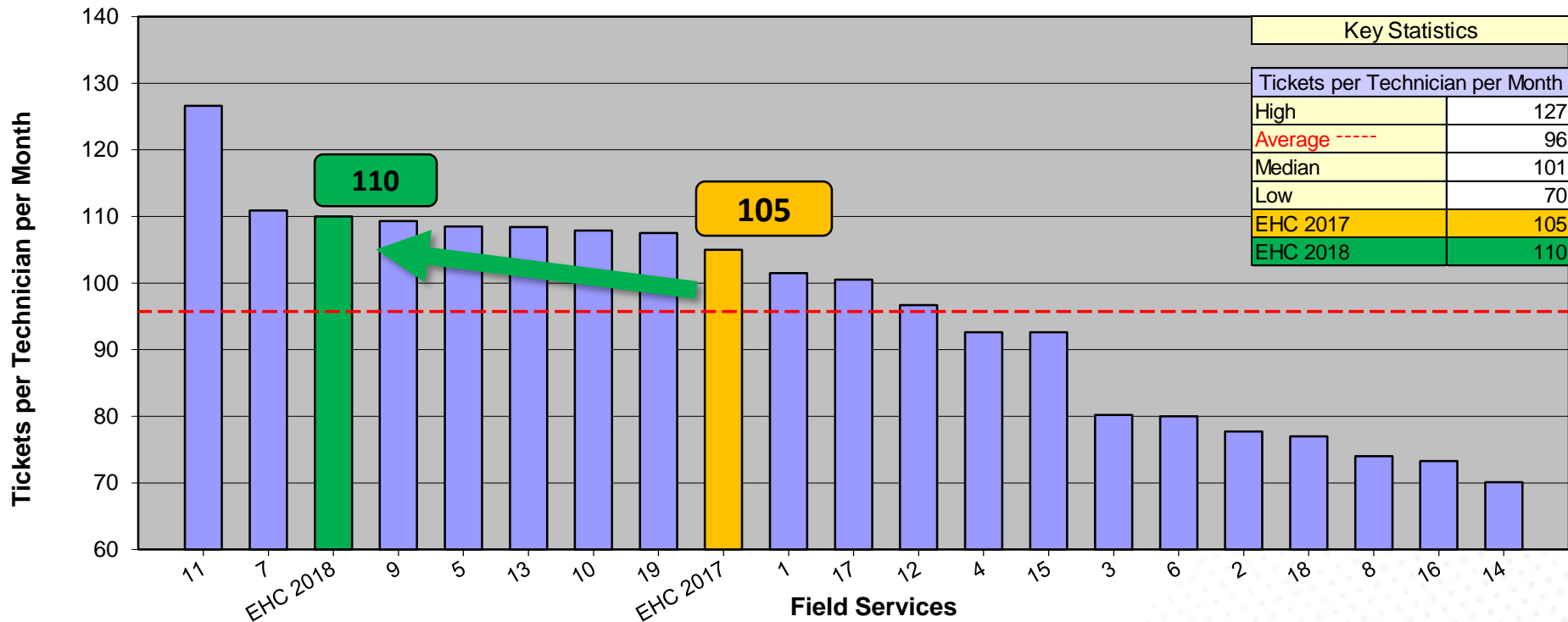
Improvements in the Help Desk Balanced Score



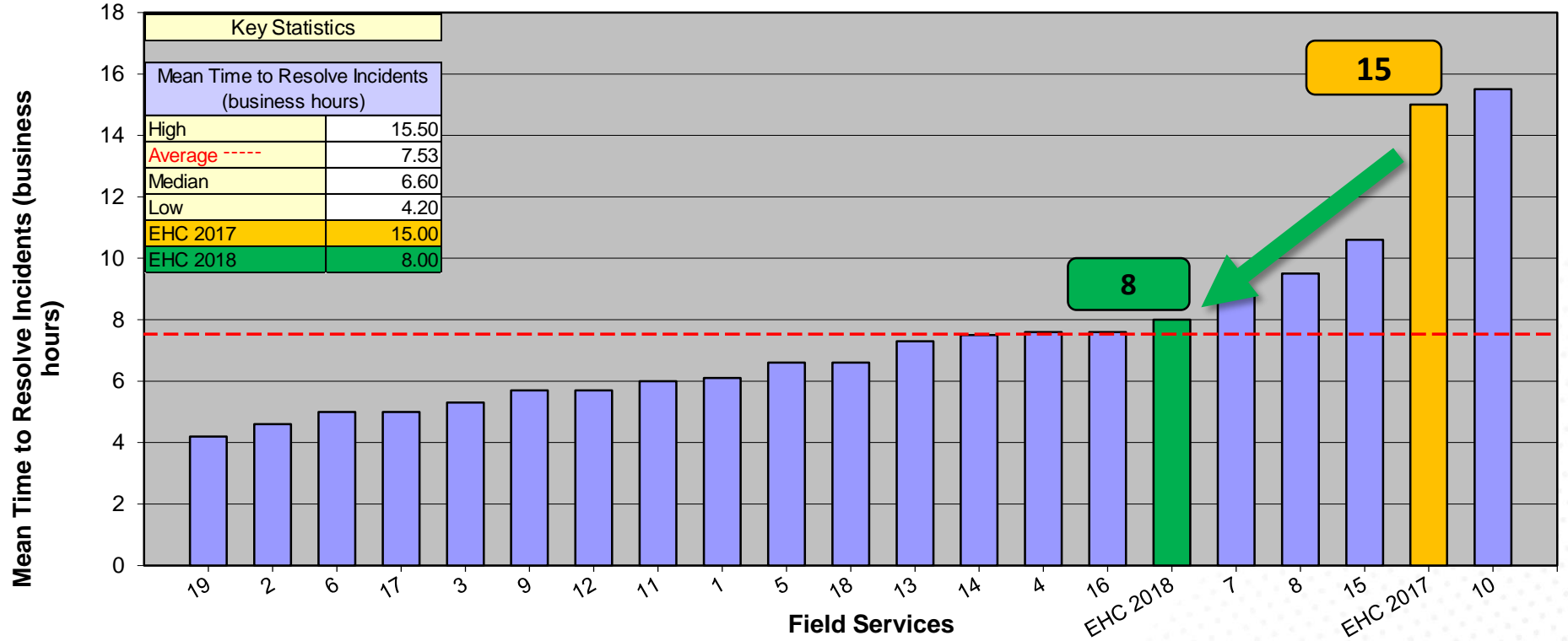
Help Desk Process Maturity vs. Scorecard Performance



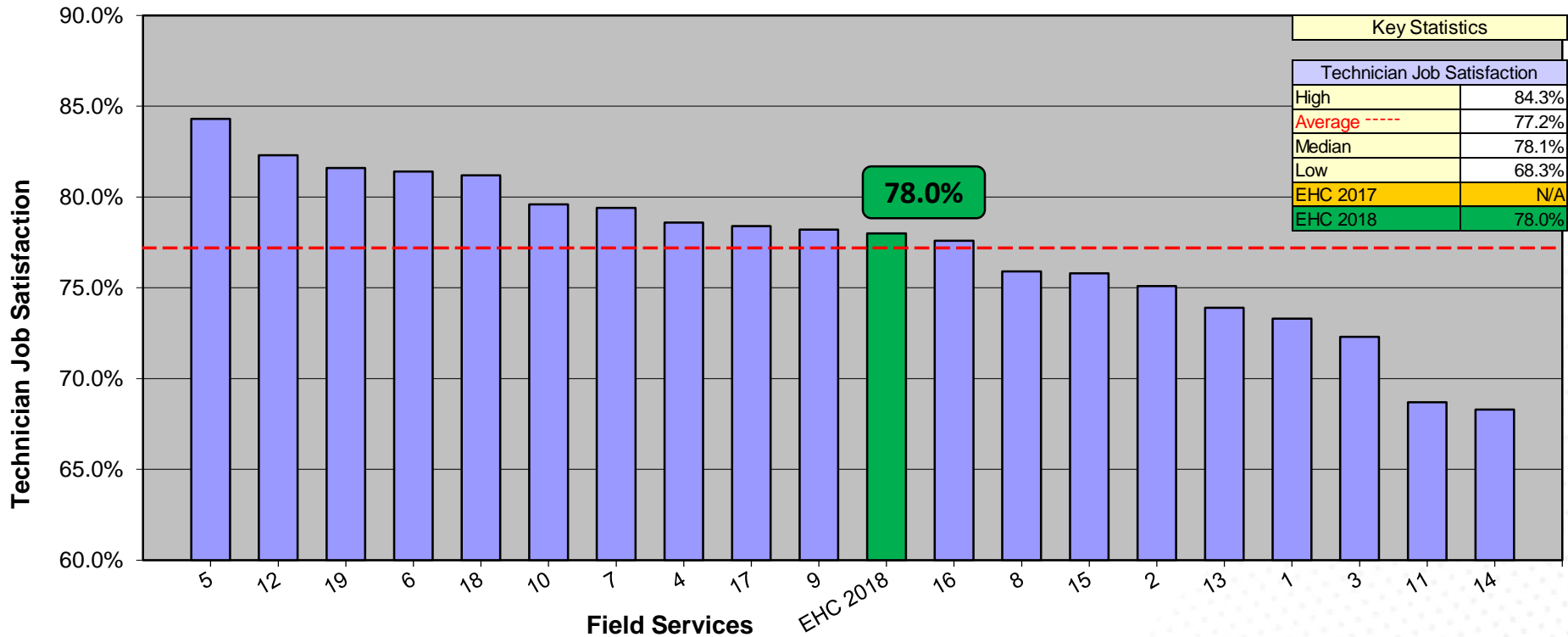
Field Services Metrics: Tickets per Tech per Month



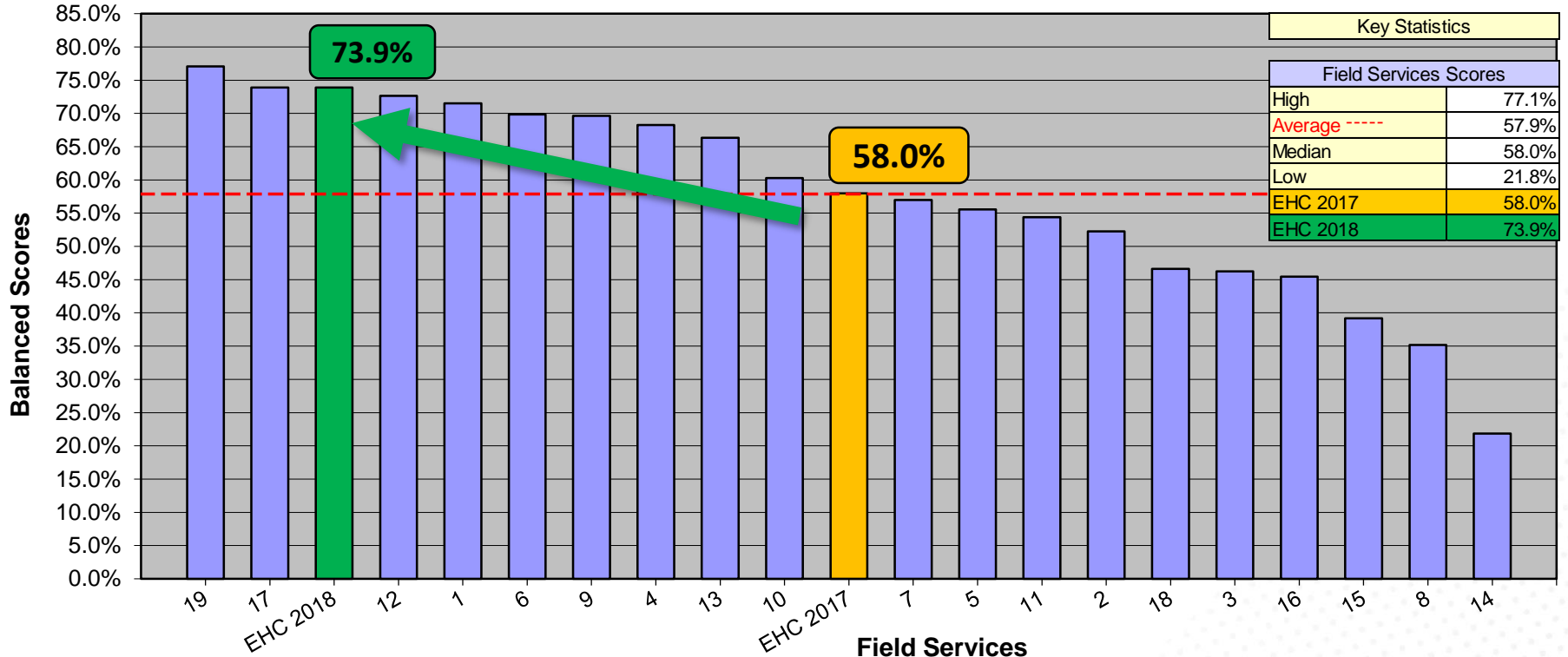
Field Services Metrics: MTTR Incidents



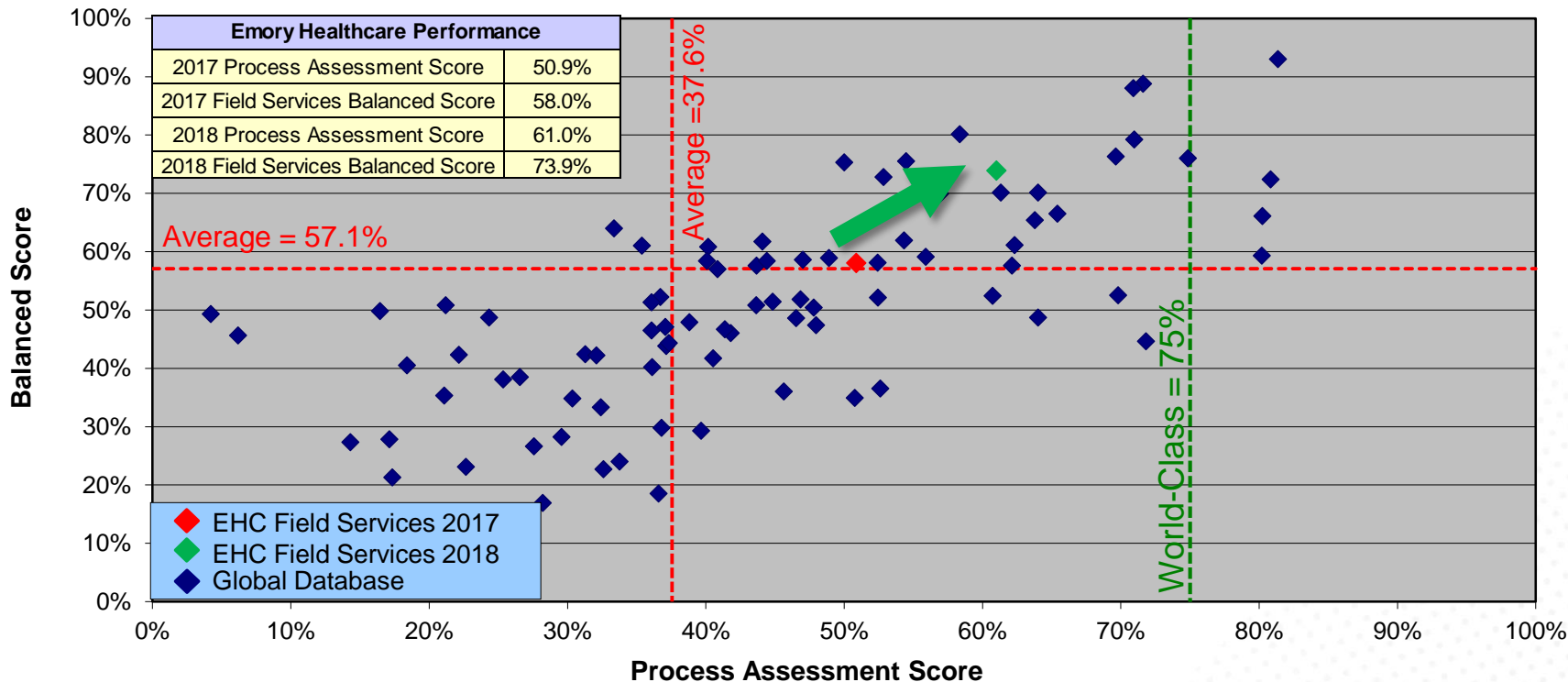
Field Services Metrics: Technician Job Satisfaction



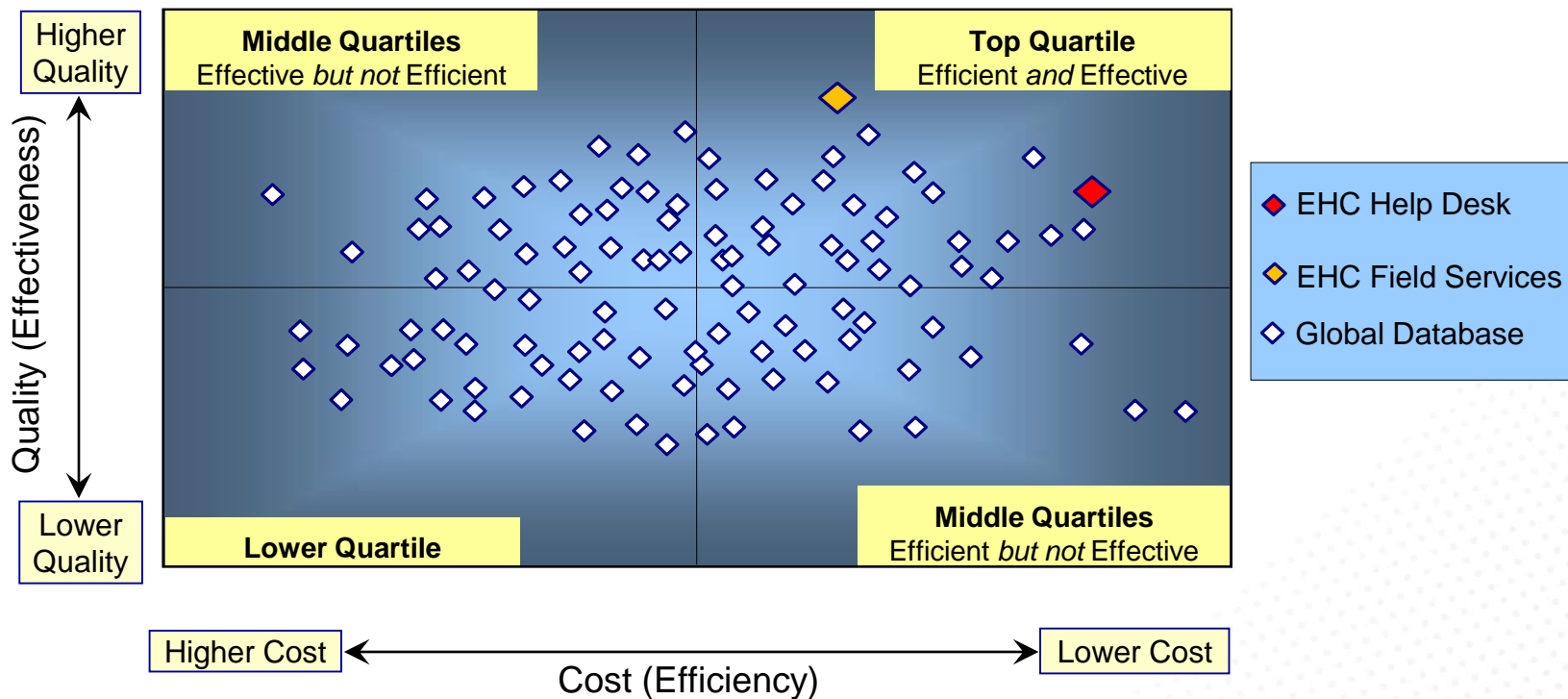
Improvements in the Field Services Balanced Score



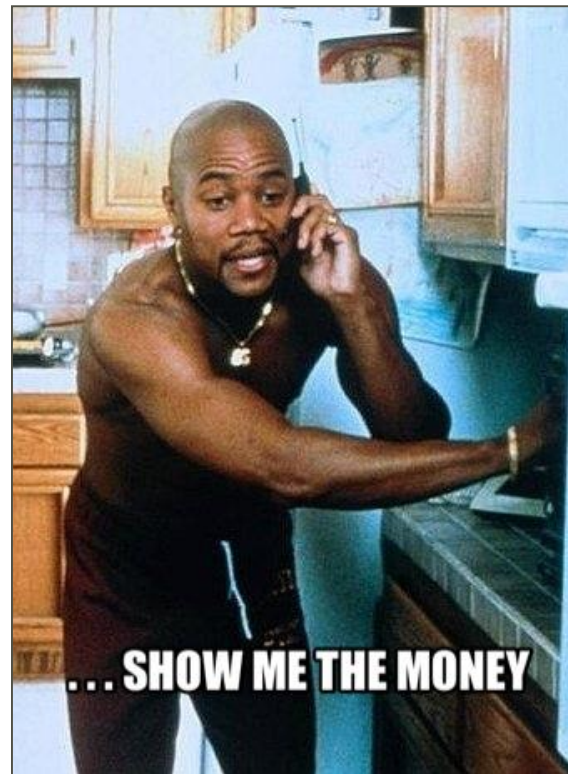
Field Services Process Maturity vs. Scorecard Performance



Cost vs. Quality for Emory Healthcare Client Services



Show Me the Money!



The Estimated ROI for Client Services is > 200%

ROI Metric	Help Desk	Field Services
Monthly Ticket Volume	14,569	3,361
Estimated Productivity Gain per Ticket (minutes)	20	180
Annual Productivity Gain (hours)	58,276	120,996
Annual Productivity Gain FTEs	32	67
Estimated Value of Productivity Gain (return)	\$3,885,067	\$8,066,400
Annual Operating Expense (investment)	\$1,694,669	\$3,824,425
Estimated Annual ROI	229%	211%
Total Estimated Client Services ROI	217%	

Project Goal: World-Class IT Service and Support

- Service consistently exceeds customer expectations
 - Result is high levels of Customer Satisfaction
 - Top Quartile Customer Satisfaction
- Costs are managed at or below industry average levels
 - Cost per Ticket below average
 - Bottom quartile Cost per Ticket
- Service and Support follow industry best practices
 - Practices and Procedures are well defined and well documented
 - Service and Support follows industry best practices
- Every transaction adds value
 - A positive customer experience
 - Creates ROI > 100%



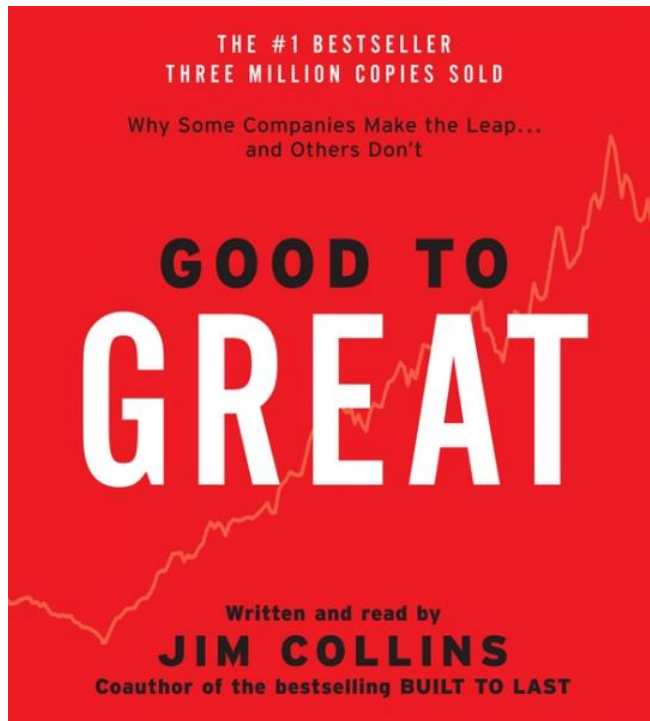
Client Services at Emory is a Center of Excellence

- Costs are below average
 - Efficient delivery of support services
 - Quality of service is above average
 - Effective delivery of support services
 - ROI is well above 100%
 - The support model is relatively mature
 - Management is highly regarded and morale is good
 - Self-Awareness is good – you generally know your weaknesses
- Client Services has a progressive and proactive culture
 - CSI – Continuous Service Improvement – e.g., production vs. service request
 - Numerous improvements are underway
 - Remedy upgrade, Bomgar implementation, for example
 - Client Services has all the qualities of a Center of Excellence (COE)
 - Client Services can serve as a model for other support functions such as CBS
 - And can potentially absorb and/or supplement these support roles

Transformation Success Factors: Lessons Learned

- Establish a Current State Baseline – Brutal Honesty about the Challenges
- Establish a Clear, Bold Vision – Know Where you Want to Go
- Build Buy-in and Support from Senior Leadership
- Relentless Execution and Scalability – Don't Get Sidetracked!
- Measure Your Progress – Early Success Drives Even Greater Success!
- Communicate Your Progress – Keep Sponsors Engaged
- Institutionalize Best Practices – Make them Part of Your DNA!

From Good to Great in One Year!



Questions?



SERVICE MANAGEMENT WORLD

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Thank You!

Questions?



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About MetricNet

Your Benchmarking Partner

Your Speaker: Jeff Rumburg



- Co Founder and Managing Partner, MetricNet, LLC
- Winner of the Ron Muns Lifetime Achievement Award
- Named one of HDI's Top 25 Thought Leaders in 2016 and 2017
- Former CEO, The Verity Group
- Former Vice President, Gartner
- Founder of the IT Service and Support Benchmarking Consortium
- Author of *A Hands-On Guide to Competitive Benchmarking*
- Harvard MBA, Stanford MS

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- Customer Service
- Technical Support
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- Collections

Telecom

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Satisfaction

- Customer Satisfaction
- Employee Satisfaction



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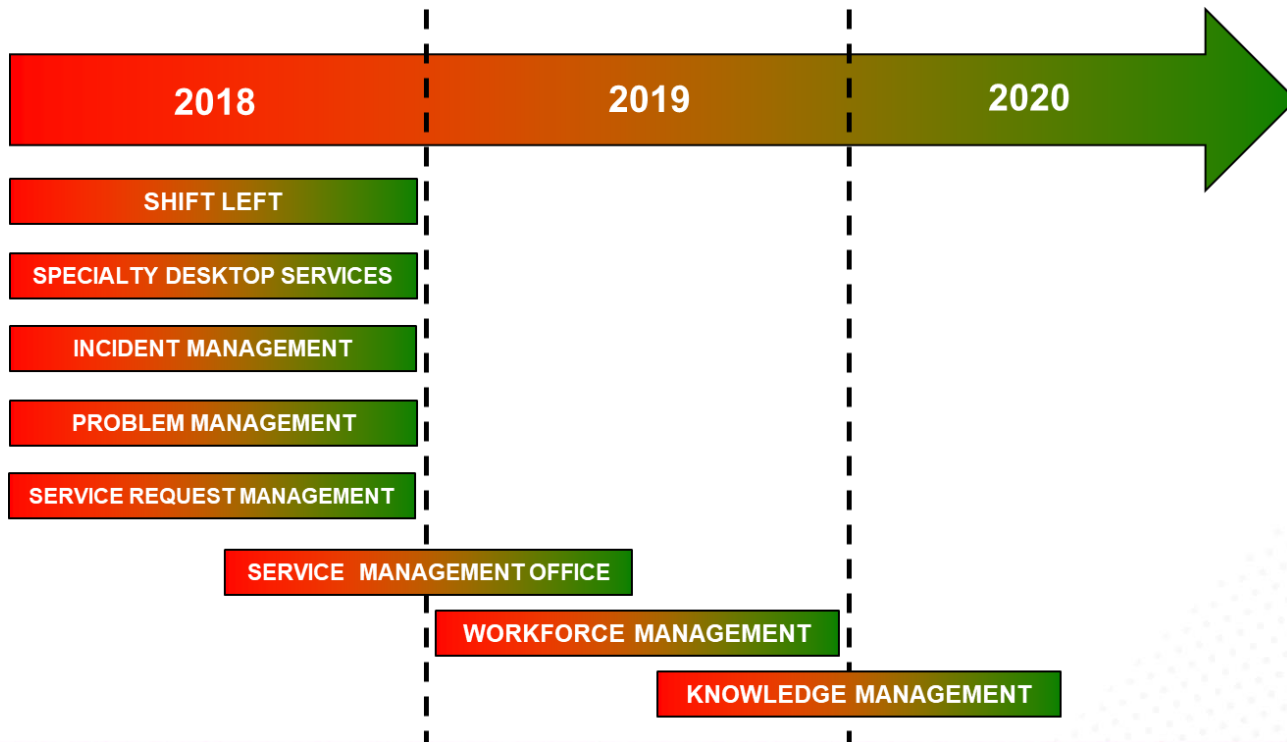


The Biggest Challenges Were Outside of Client Services

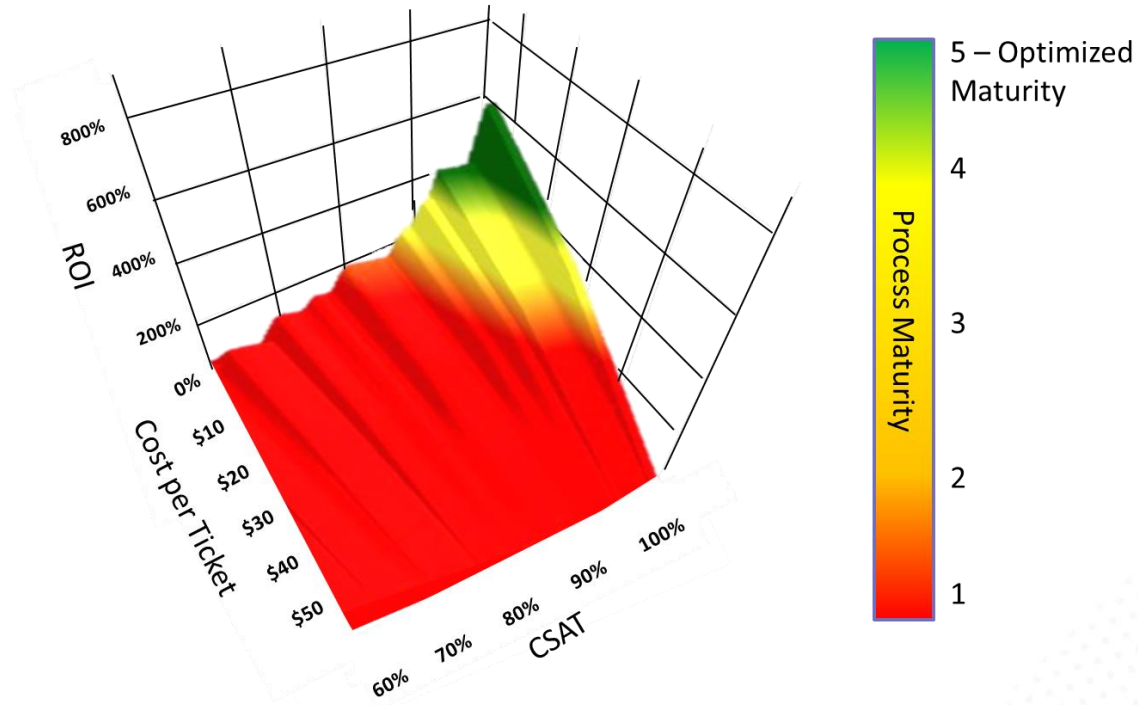
- Accountability was generally lacking
 - Customer support is not always given high priority
 - The backlog of open tickets is excessive
 - Communication with the customer during open tickets is often lacking
- Expectations for Client Services from other support groups and resolver groups were unrealistic
 - They want more initial troubleshooting, for example, but do not provide tools and training to support that goal
- There is very little knowledge capture outside of client services
 - This exacerbates the challenge of Client Services providing initial troubleshooting

- Support groups and resolver groups outside of Client Services generally have limited metrics, and weak reporting
 - Some do not even know their ticket volumes
- Access rights to key systems are sometimes denied to Client Services; e.g., ePrint and certain password resets
- It is unclear when a project goes into production
 - eICU, for example, continues to be managed as a project
- There is a lot of “bypass”, e.g., customers going directly to resolver groups for support

The Three Year Roadmap



Characteristics of an Optimized Support Organization

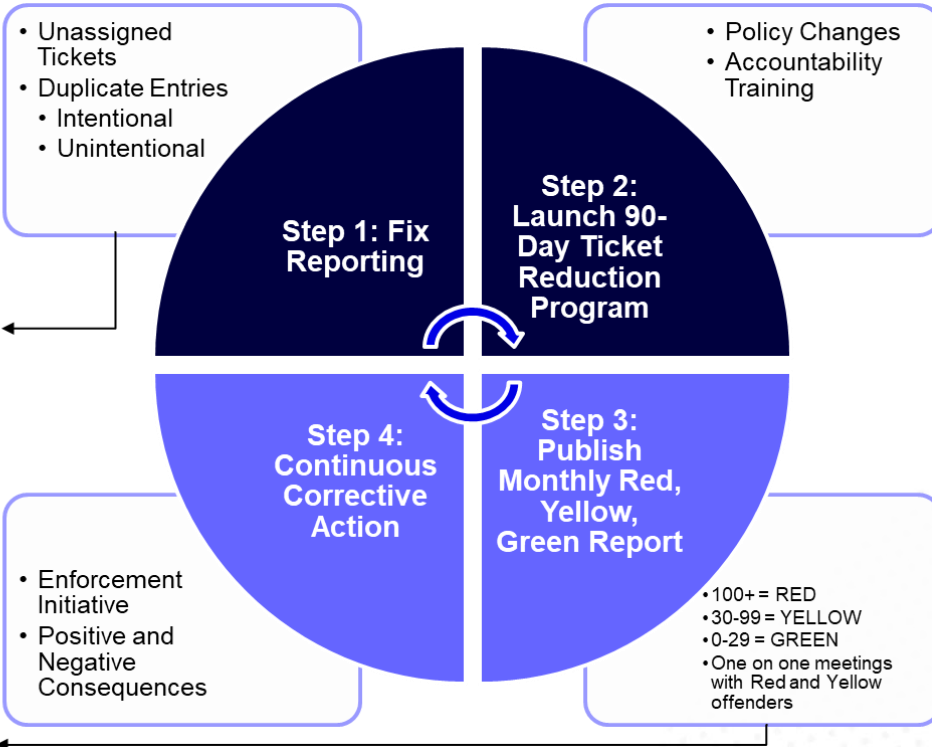


Backlog Reduction Action Plan – Non-Client Services

**41% of Total is Mgr Unassigned”
16% of Total = “Unassigned Individual”**

Manager	Count of Incidents	
Warehouse	5	5
Warehouse Bench Support	7	7
Warehouse New PC Installation	28	28

SRT - Project Team	4	11	25	48
	1	0	0	0
	1	0	1	0
	0	0	1	13



Manager	Count of Incidents	0-14	15-29	30-99	100+	% OF 100+
Mgr Unassigned	217	75	25	32	85	19%
	357	170	52	73	60	14%
	27	8	6	13	0	0%
	26	7	6	13	0	0%
	78	58	20	0	0	0%
	25	16	7	0	0	0%
	23	15	7	0	0	0%
	10	3	7	0	0	0%

From Client Services to Individual Agents

This Month's Scorecard

Key Performance Indicators (KPIs)	KPI Weighting	Emory Healthcare Performance	Oct 2017 Performance Range		KPI Score	Balanced Score
			Worst Case	Best Case		
Field Services Score	40.0%	30.0%	n/a	n/a	30.0%	12.0%
Help Desk Score	40.0%	73.0%	n/a	n/a	73.0%	29.2%
Ticket Backlog	20.0%	1,338	3,000	100	57.3%	11.5%
	100%					52.7%

Areas for Improvement

- 1 Poor Customer Satisfaction for Field Services.
- 2 Slow increase of Help Desk costs.
- 3 Ticket backlog still high.

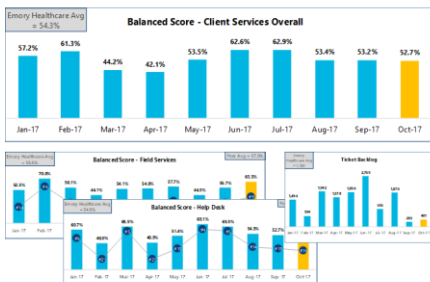
This Month's Scorecard

Key Performance Indicators (KPIs)	KPI Weighting	Agent 1 Performance	Oct 2017 Performance Range		KPI Score	Balanced Score
			Worst Case	Best Case		
Customer Satisfaction	35.0%	95.0%	73.0%	97.0%	91.7%	32.1%
Tickets Handled this Month	35.0%	316	267	591	15.1%	5.3%
Ticket Quality	30.0%	75.0%	60.0%	99.0%	38.5%	11.5%
	100%					48.9%

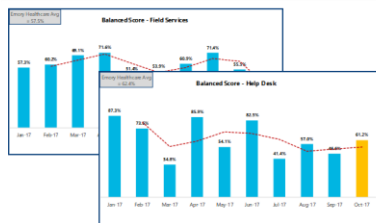
Areas for Improvement

- 1 Study [XYZ issue] troubleshooting steps to improve FCR rate, in order to increase Customer Satisfaction.
- 2 Improve schedule adherence in order to handle more tickets.
- 3 Improve ticket documentation in [XYZ ways].

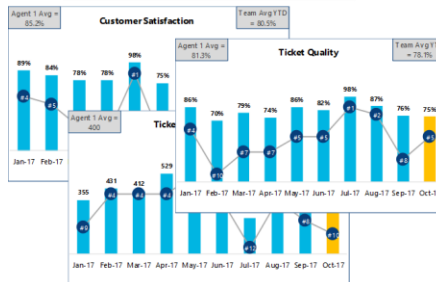
Scorecard Trends



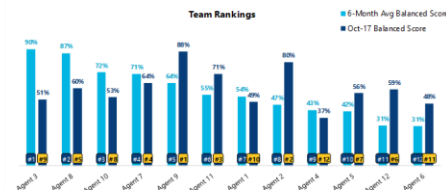
Field Services and Help Desk Trends



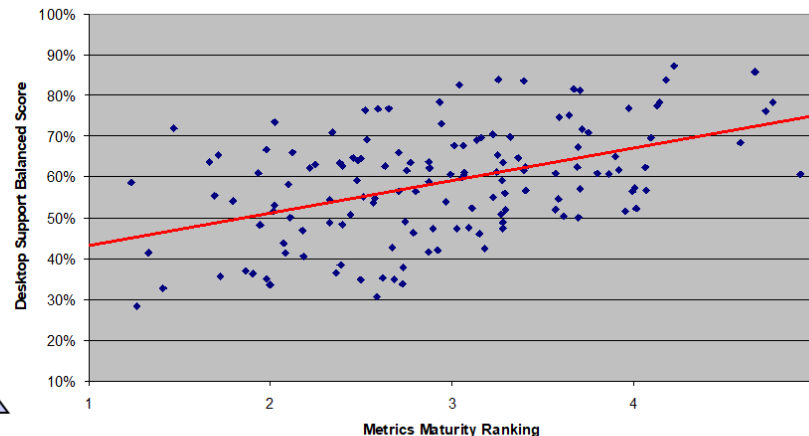
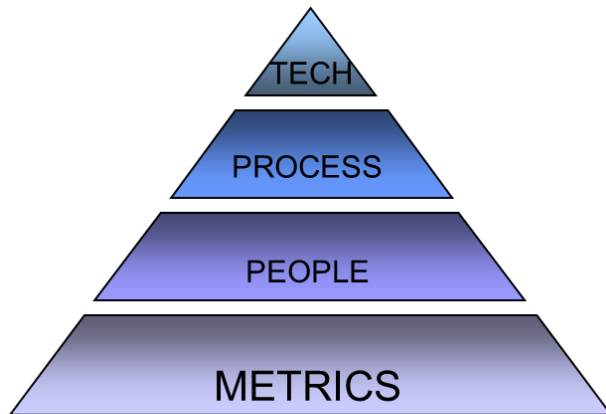
KPI Trends



Agent Scorecard Rankings



Maturing the Metrics



	Key Performance Indicators			
	Customer Quality	Ticket Quality	Productivity	Ticket Handling
Help Desk	CSAT	Ticket Quality Score	Tickets per Agent per Month	FCR, FLR
Field Services	CSAT	Ticket Quality Score	Tickets per Tech per Month	FCR, MTTR
Specialty Desktop Services	CSAT	Ticket Quality Score	Tickets per Tech per Month	FCR, MTTR