

HDI®

GET READY FOR THE
(R)EVOLUTION
OF SUPPORT AND
SERVICE MANAGEMENT

CONFERENCE & EXPO

**Session 205: Radical Success: Managing
Service and Support as a Business**

Jeff Rumburg

#HDIConf

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#HDIConf

MetricNet.com/HDI19

MetricNet[™]
Performance Benchmarking

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Service Desk KPIs
Definitions & Correlations



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:


- > Cost
- > Productivity
- > Service Level
- > Quality
- > Agent
- > Contact Handling

MetricNet Performance Benchmarking
www.metricnet.com
703.992.8160
info@metricnet.com

MetricNet[™]
Performance Benchmarking

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Desktop Support KPIs
Definitions & Correlations



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:

- > Cost
- > Productivity
- > Service Level
- > Quality
- > Technician
- > Ticket Handling
- > Workload

MetricNet Performance Benchmarking
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- **MetricNet Global Benchmarking Database**
- **Nearly 4,000 Benchmarks**
- **70+ Key Performance Indicators**
- **Nearly 120 Industry Best Practices**

Reactive Stage



- Newer and less evolved support organizations are in this category
- A reactive “fire-fighting” mentality prevails at this stage
- Focus tends to be almost exclusively on service level compliance
- Support is continuously playing catch-up with user needs and expectations

Growth Stage



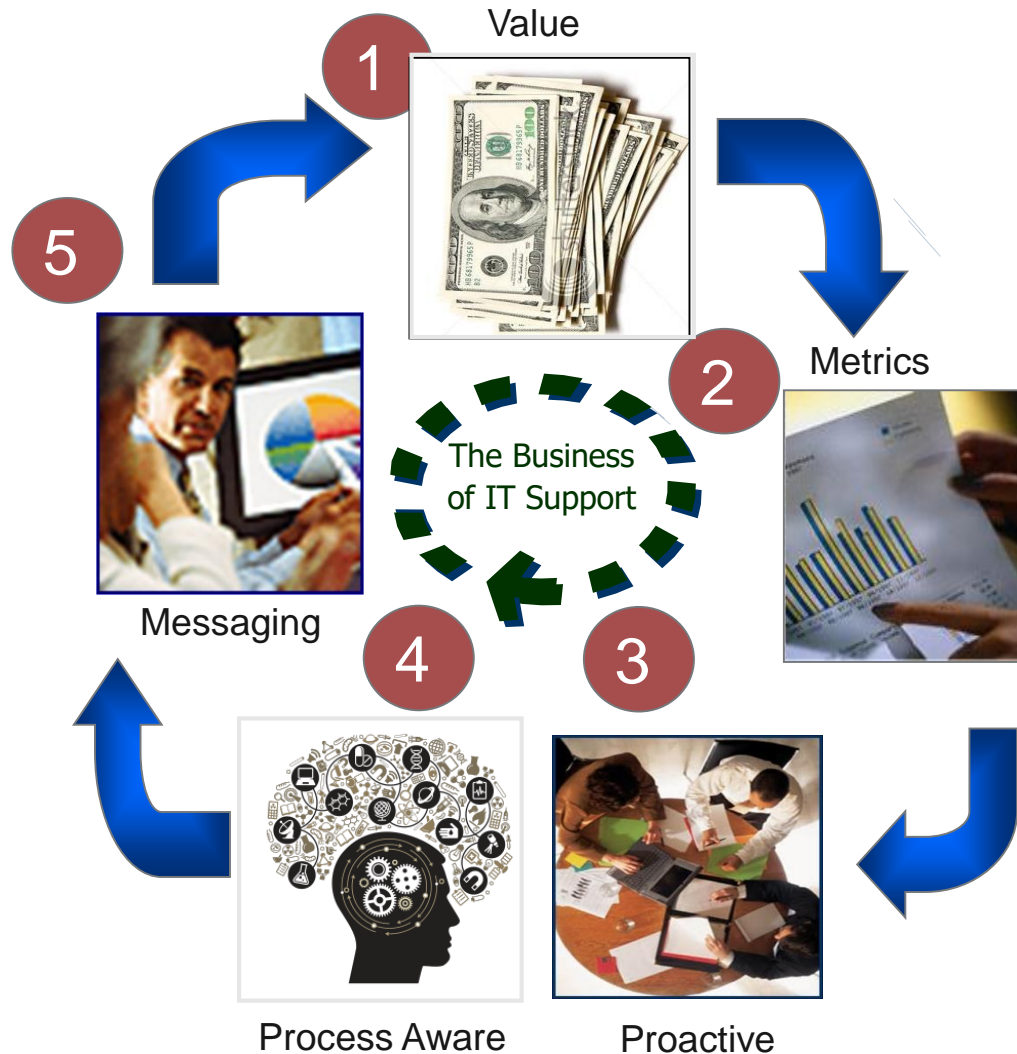
- Heavy investments in training, tools, and metrics characterize this stage
- A knowledge base of problem solutions is typically established
- An expert network of problem solvers is developed outside of support
- User self-help begins: user-enabled password resets, user searchable knowledge base

Strategic Stage

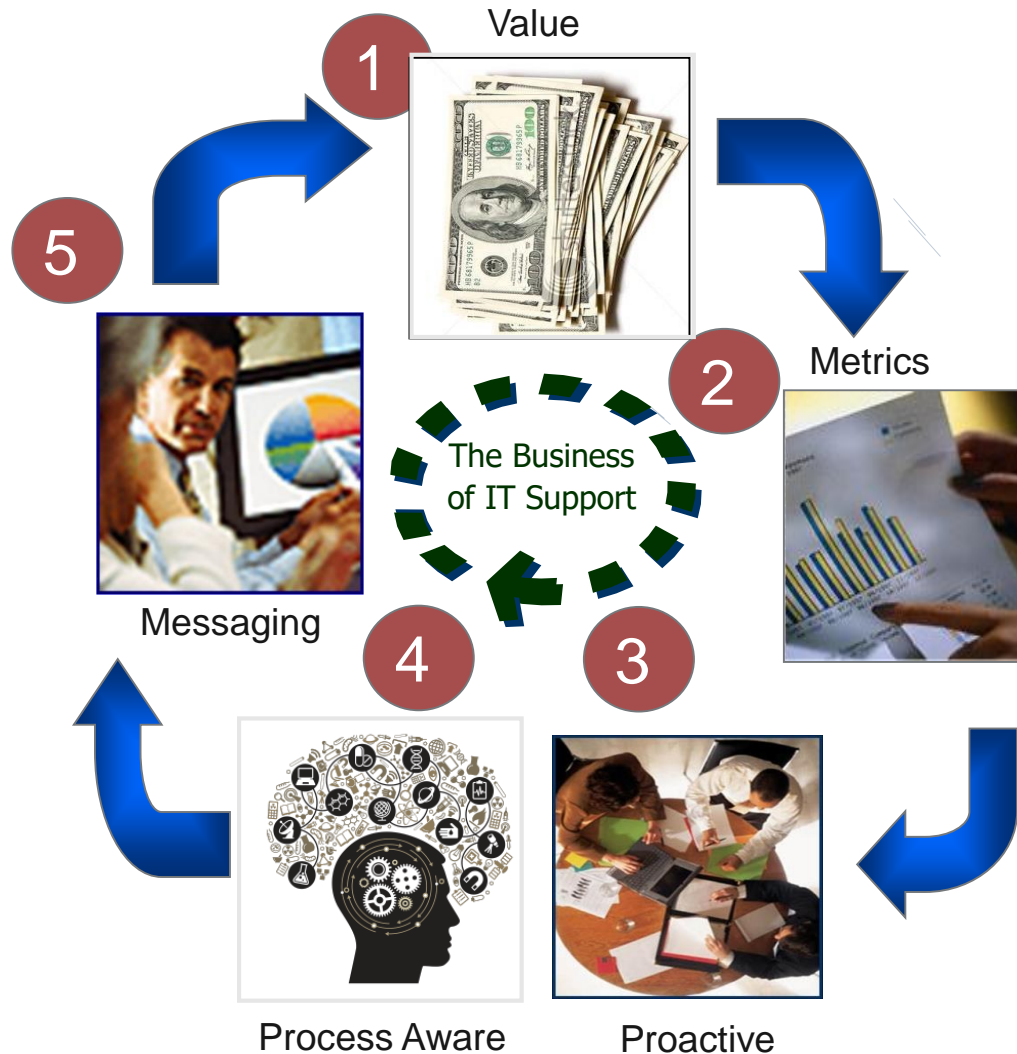


- The primary purpose of a strategic support organization is to make end users more productive, and to drive a positive view of IT
- A preventive, proactive culture prevails
- Support anticipates user needs and expectations, and provides services accordingly
- Customer enthusiasm and value creation is the goal!



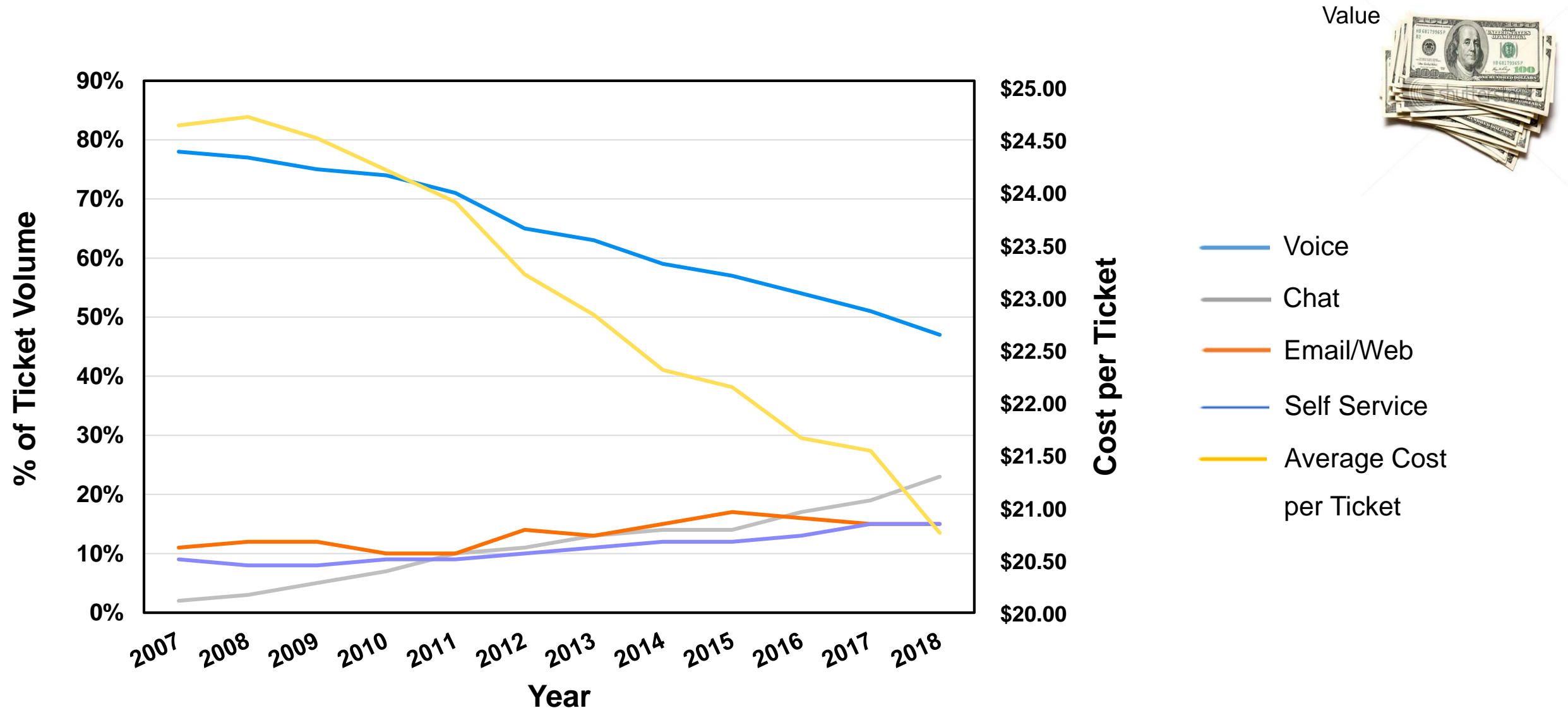


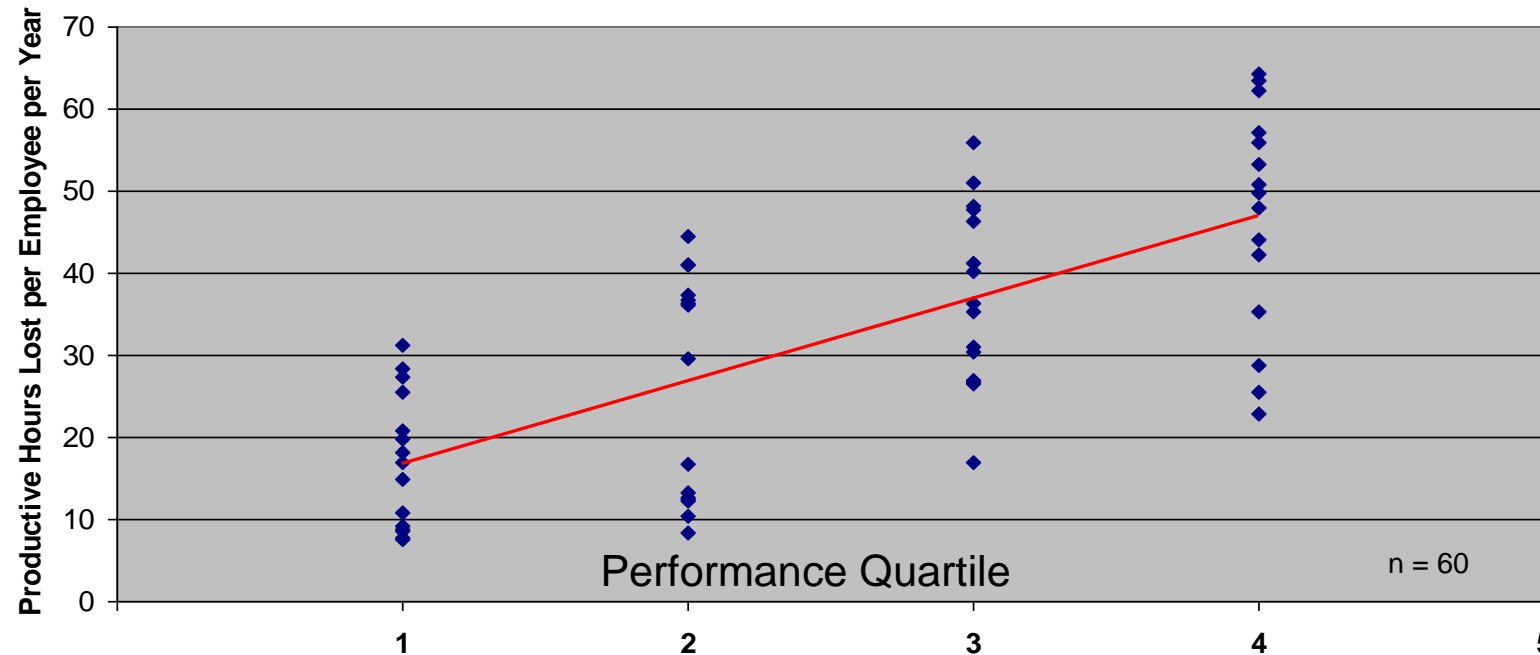
Model Component	Description
1. Value	Leverage end-user productivity and TCO
2. Metrics	Holistic and diagnostic application of KPI's
3. Proactive	Anticipate user needs and expectations
4. Process Aware	Aware that process drives performance
5. Messaging	Actively manage stakeholder perceptions



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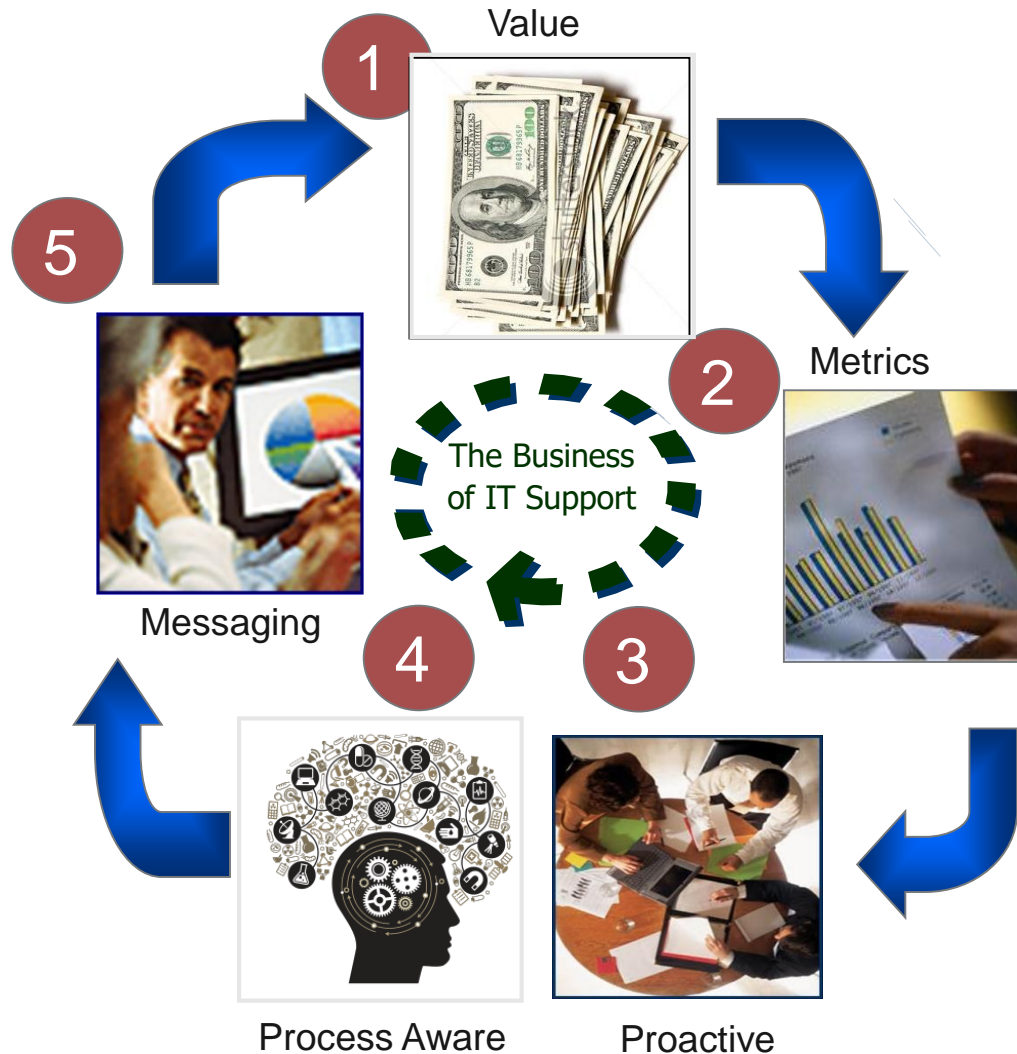




Value



Support Function	Key Performance Indicator	Performance Quartile			
		1 (top)	2	3	4 (bottom)
Service Desk	Customer Satisfaction	93.5%	84.5%	76.1%	69.3%
	First Contact Resolution Rate	90.1%	83.0%	72.7%	66.4%
	Mean Time to Resolve (hours)	0.8	1.2	3.6	5.0
Desktop Support	Customer Satisfaction	94.4%	89.2%	79.0%	71.7%
	First Contact Resolution Rate	89.3%	85.6%	80.9%	74.5%
	Mean Time to Resolve (hours)	2.9	4.8	9.4	12.3
Average Productive Hours Lost per Employee per Year		17.1	25.9	37.4	46.9



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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

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

Service Level

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

And there are hundreds more!!

Metrics



Cost

- Cost per Ticket

Quality

- Customer Satisfaction

Productivity

- Agent Utilization

Call Handling

- First Contact Resolution Rate

TCO

- First Level Resolution Rate

Agent

- Agent Job Satisfaction

Aggregate

- Balanced Scorecard

Metrics



Performance Metric	Metric Weighting	Performance Range		Your Actual Performance	Metric Score	Balanced Score
		Worst Case	Best Case			
Cost/Price per Inbound Contact	25.0%	\$64.46	\$5.47	\$26.14	65.0%	16.2%
Customer Satisfaction	25.0%	65.3%	99.3%	99.3%	100.0%	25.0%
Agent Utilization	15.0%	34.7%	68.1%	47.1%	37.1%	5.6%
Net First Contact Resolution Rate	15.0%	67.9%	95.1%	79.6%	43.0%	6.5%
Agent Job Satisfaction	10.0%	58.8%	92.3%	80.6%	65.1%	6.5%
Average Speed of Answer (seconds)	10.0%	171	20	171	0.0%	0.0%
Total	100.0%	N/A	N/A	N/A	N/A	59.8%

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

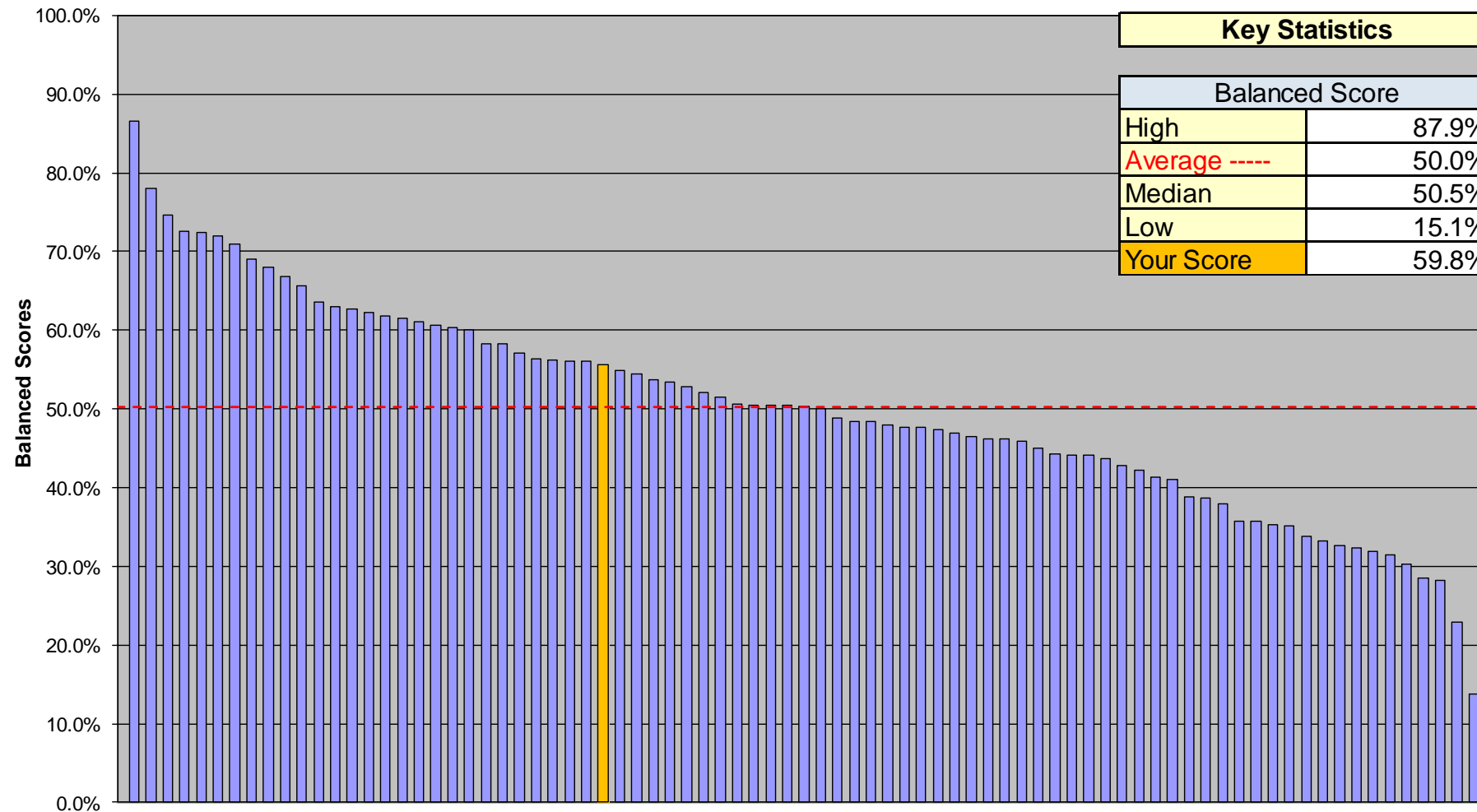
Your score for each metric is then calculated:

$$\frac{\text{worst case} - \text{actual performance}}{\text{worst case} - \text{best case}} \times 100$$

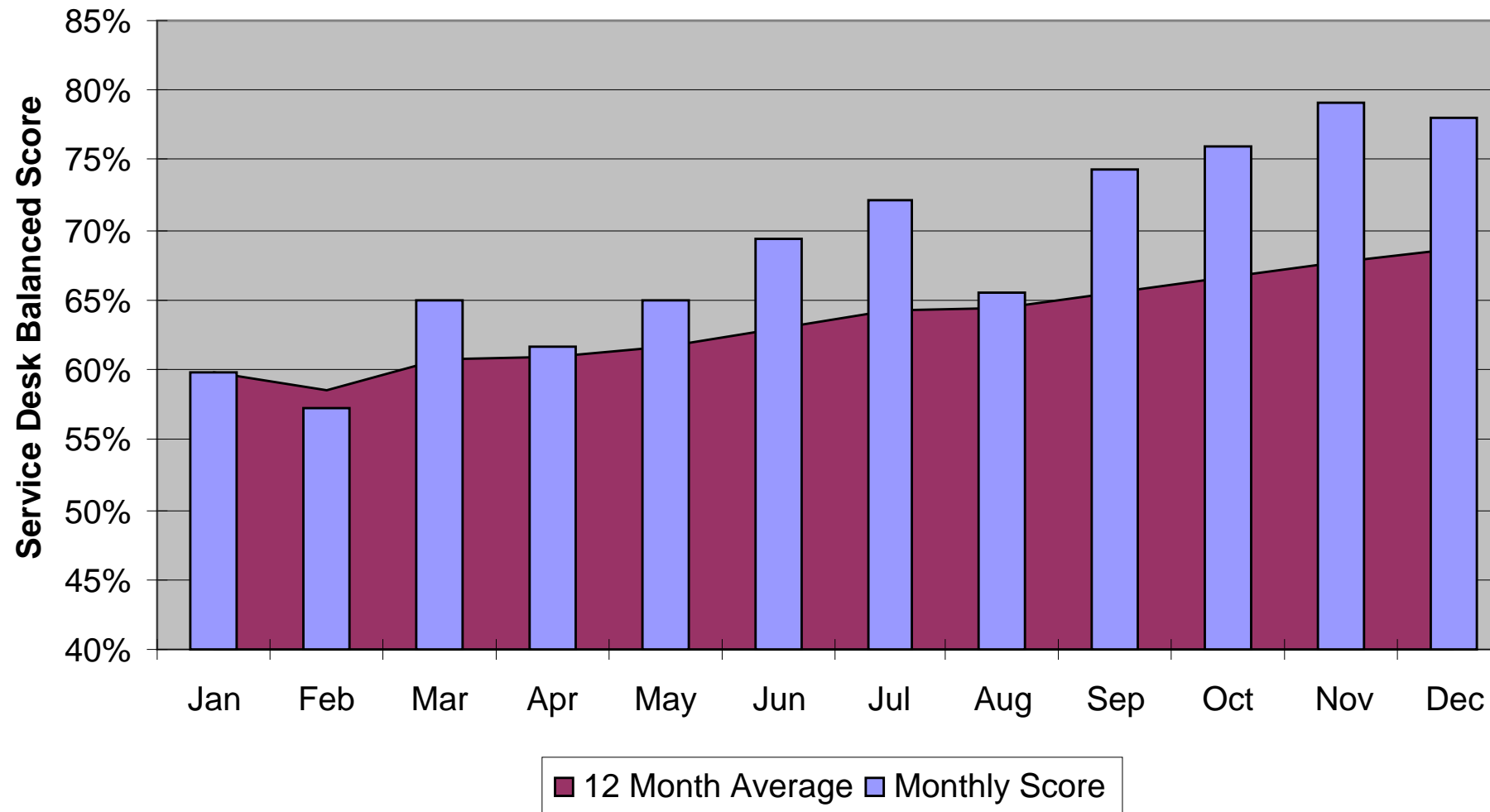
Step 6

Your balanced score for each metric is calculated: metric score X weighting

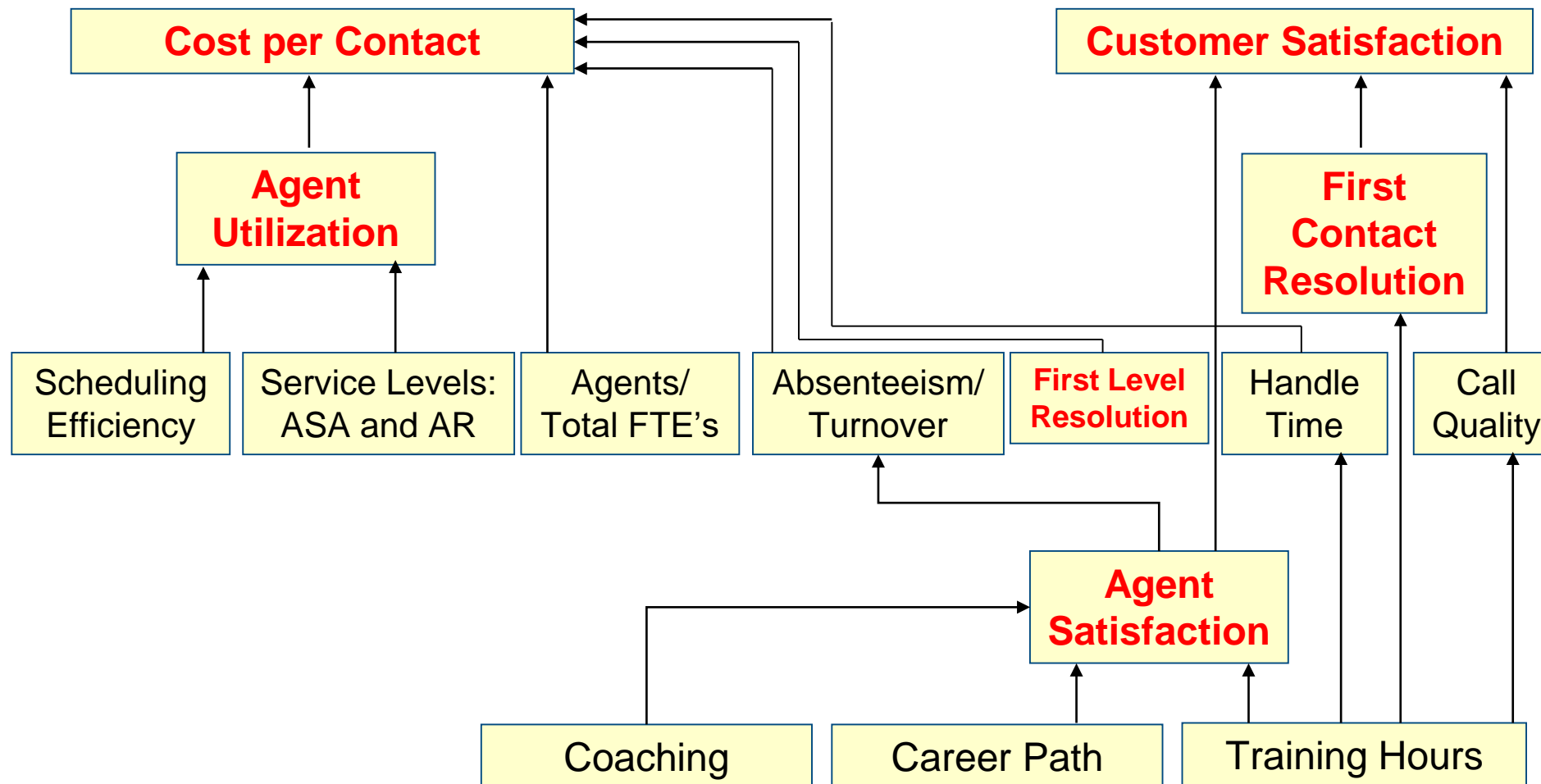
Metrics

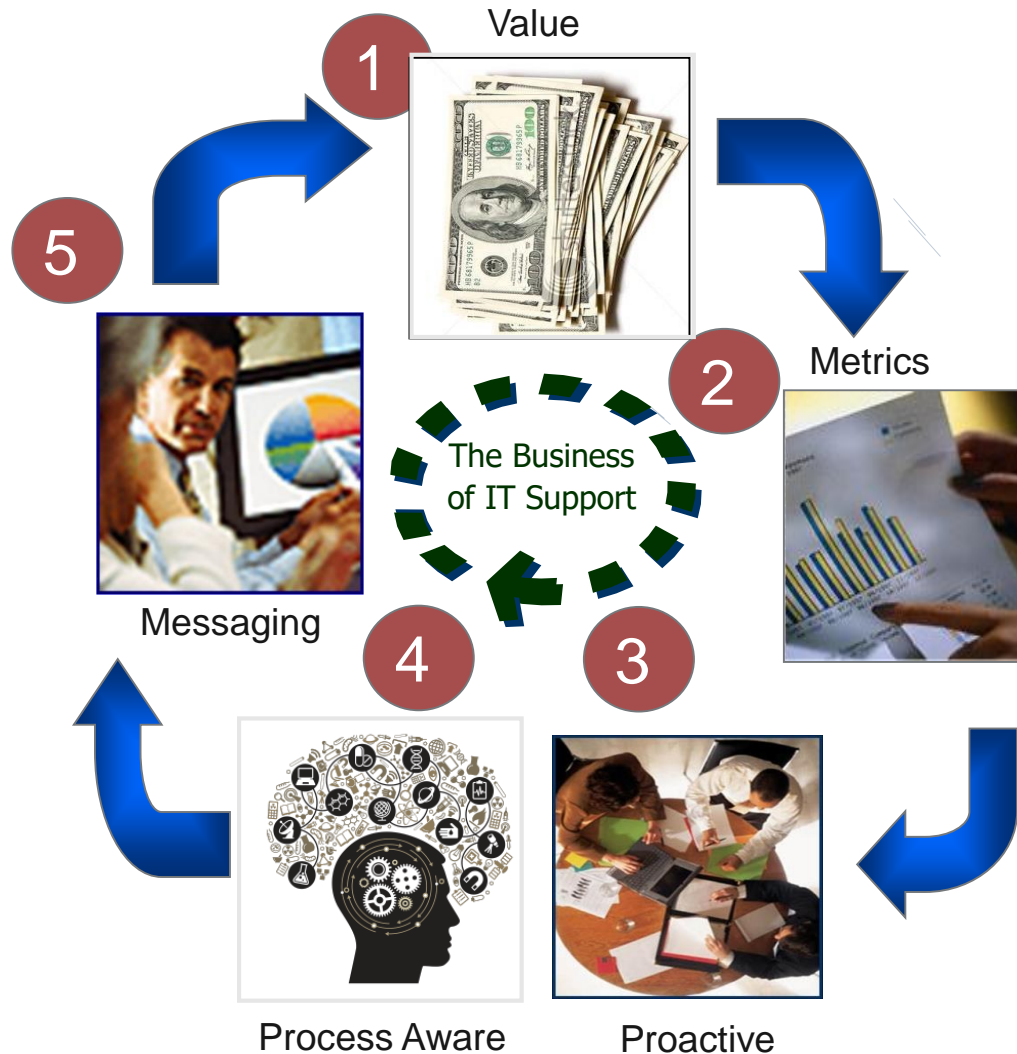


Metrics



Metrics






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Proactive



Some Common Proactive Behaviors

- 
- ☐ Problem Management / Root Cause Analysis
 - ☐ Messaging / Brand Management
 - ☐ Business Case Analysis for New Investments
 - ☐ Benchmarking
 - ☐ Goal-based Training
 - ☐ Cause-and-Effect Decision-making
 - ☐ Manage Agent Morale / Agent Job Satisfaction
 - ☐ Agent Scorecards

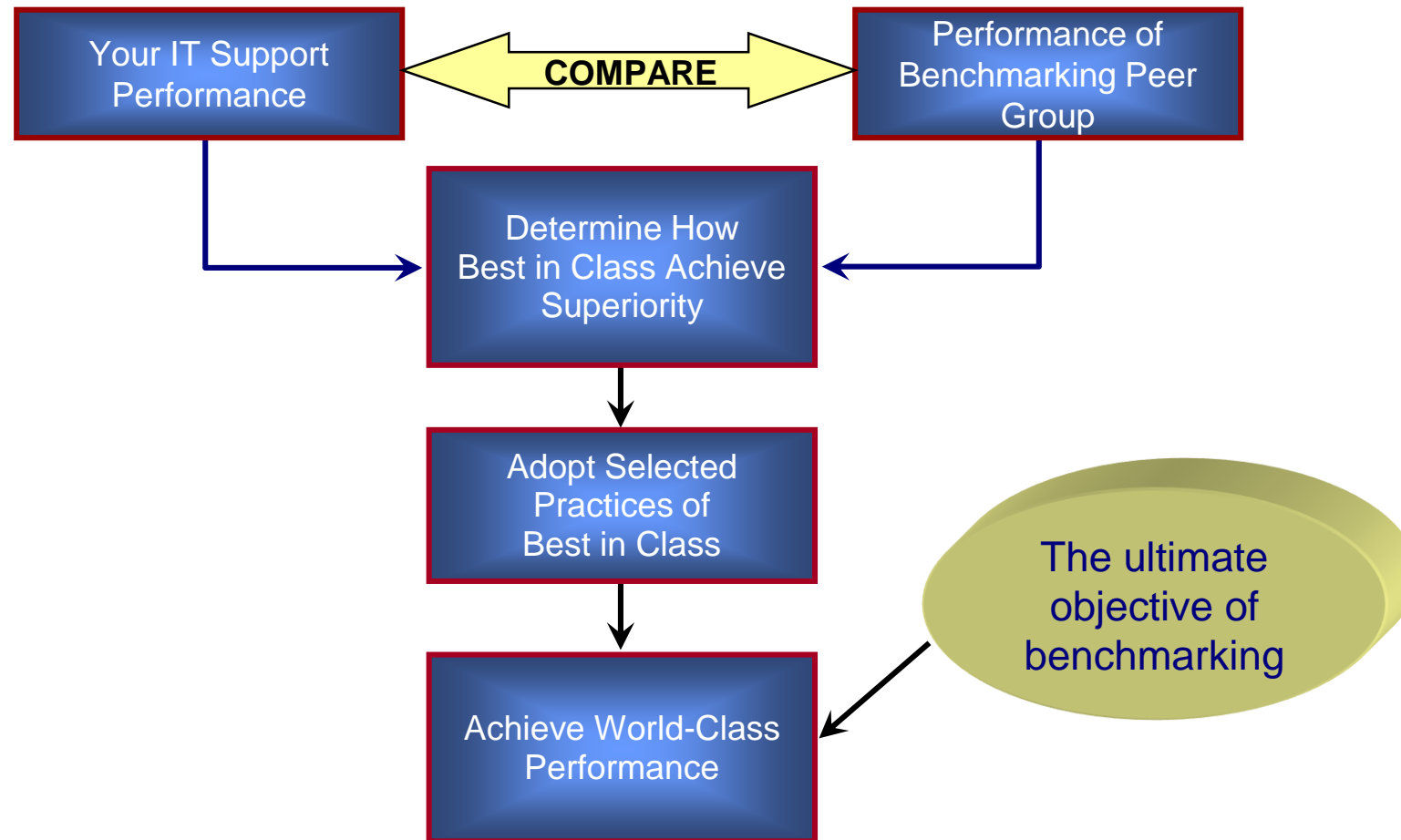
Proactive



Fewer than 20% of all IT support groups engage in benchmarking.

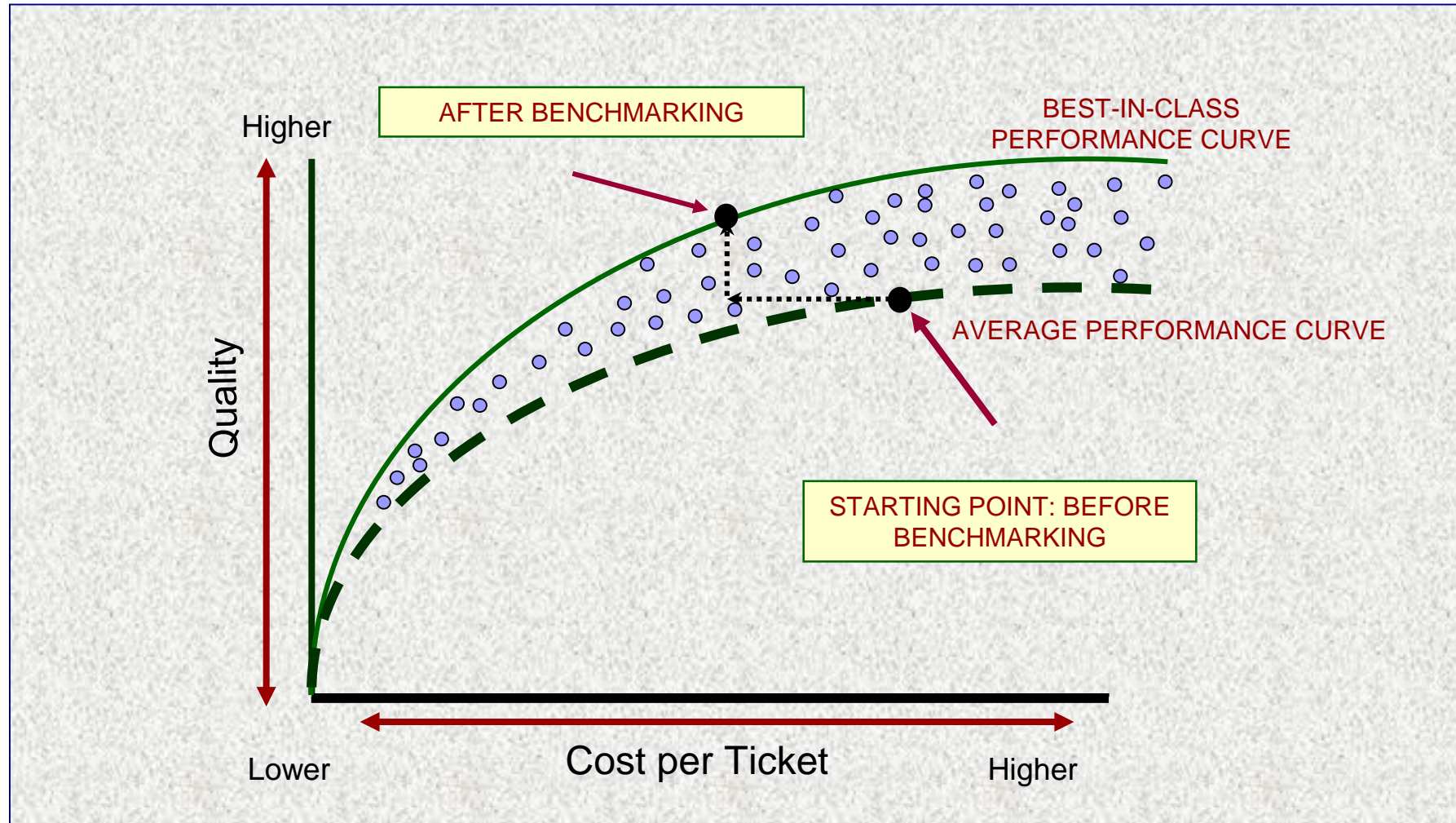
*Yet there is a 1:1 Correspondence
Between Benchmarking and World-
Class Performance!*

Proactive



The Cost vs. Quality Tradeoff

Proactive



Proactive

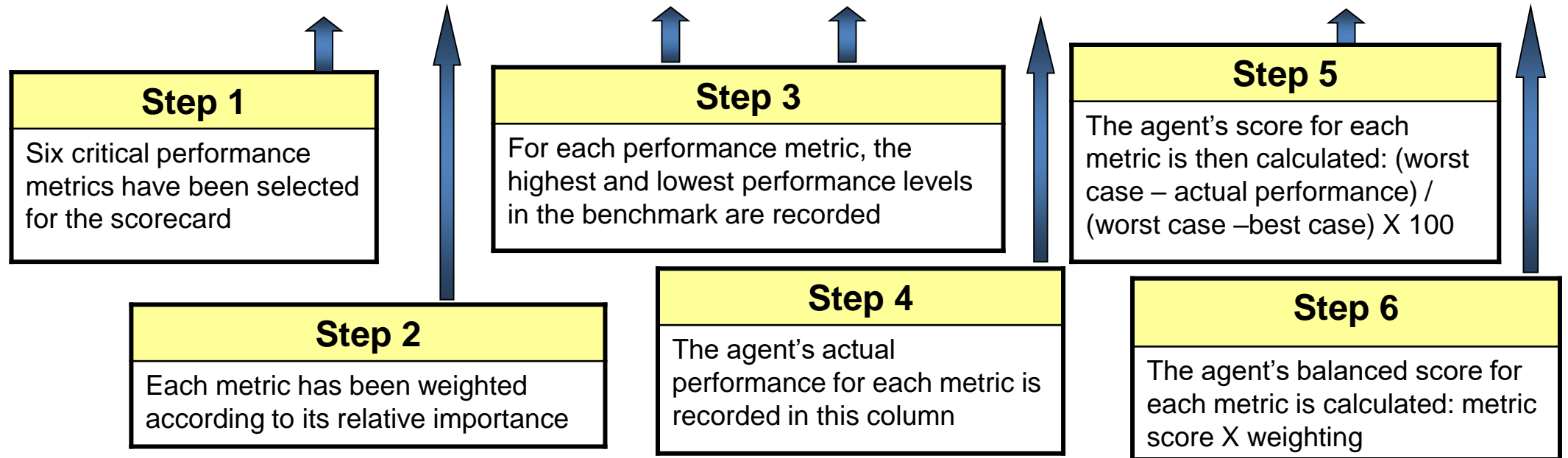


Some Common Proactive Behaviors

- ☐ Root Cause Analysis / Closed Ticket Analysis
- ☐ Messaging / Brand Management
- ☐ Business Case Analysis for New Investments
- ☐ Benchmarking
- ☐ Goal-based Training
- ☐ Cause-and-Effect Decision-making
- ☐ Manage Agent Morale / Agent Job Satisfaction
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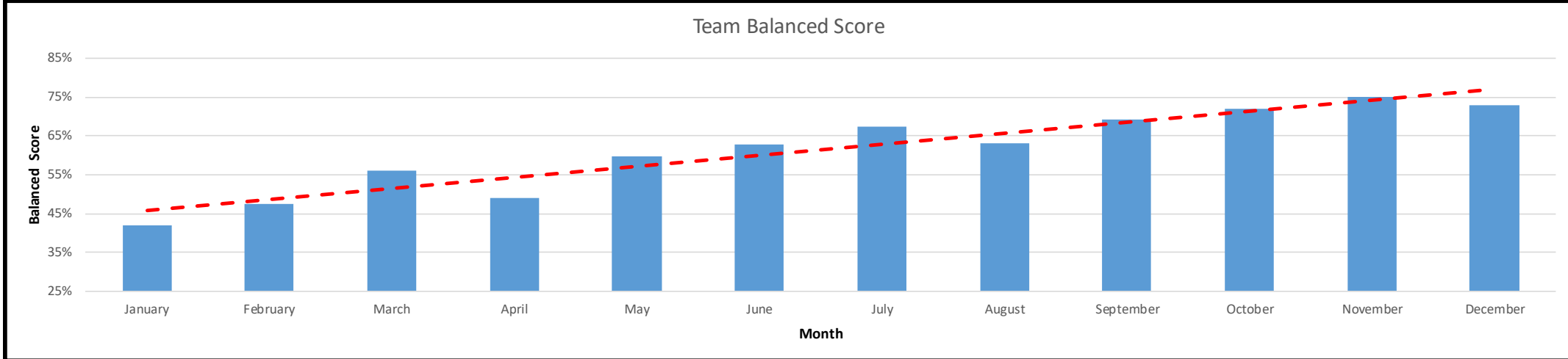


Performance Metric	Metric Weighting	Performance Range		Your Actual Performance	Metric Score	Balanced Score
		Worst Case	Best Case			
Tickets per Month	40.0%	300.0	500.0	300.0	0.0%	0.0%
First Contact Resolution Rate	30.0%	60.0%	90.0%	90.0%	100.0%	30.0%
Customer Satisfaction	30.0%	70.0%	98.0%	94.5%	87.5%	26.3%
Total	100.0%	N/A	N/A	N/A	N/A	56.3%

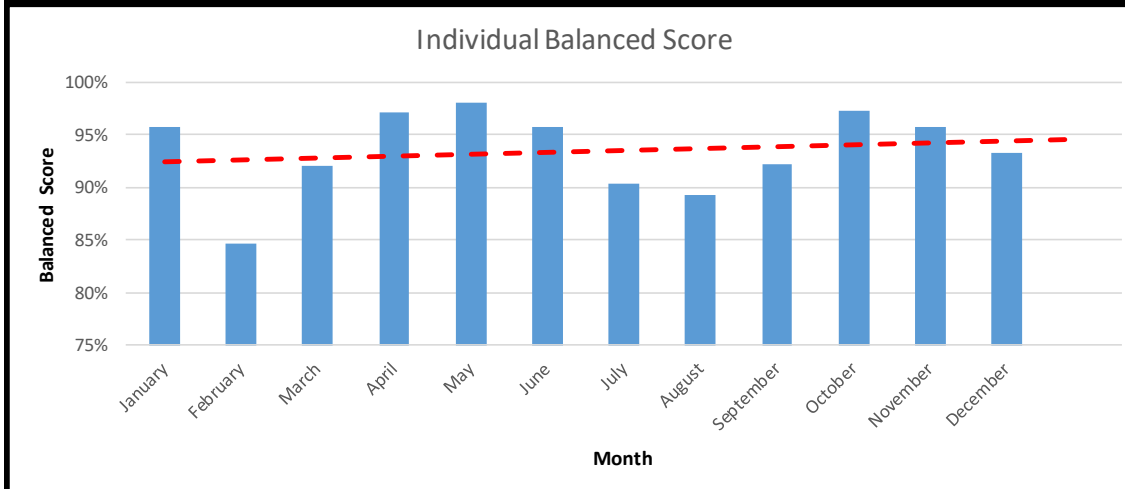


Technician Number	Monthly Ranking	Monthly Scorecard Performance						Six Month Average
		Sep	Aug	Jul	Jun	May	Apr	
11	1	95.8%	98.0%	97.1%	95.7%	98.3%	97.3%	97.0%
32	2	92.8%	92.1%	90.3%	89.3%	84.6%	92.2%	90.2%
21	3	91.5%	88.5%	83.2%	94.0%	93.7%	93.5%	90.7%
35	4	91.0%	86.8%	85.2%	78.5%	80.5%	68.2%	81.7%
14	5	89.5%	89.1%	90.0%	90.1%	92.3%	92.1%	90.5%
26	6	83.8%	84.4%	90.2%	86.5%	77.8%	63.9%	81.1%
25	7	83.0%	73.6%	81.9%	72.1%	84.8%	87.9%	80.6%
15	8	70.4%	66.6%	53.3%	56.3%	56.6%	39.0%	57.0%
20	9	64.9%	66.5%	70.1%	56.9%	40.9%	72.7%	62.0%
31	10	62.3%	47.4%	22.7%	38.4%	26.0%	93.0%	48.3%
16	11	61.0%	62.8%	54.5%	45.9%	41.7%	62.7%	54.8%
17	12	57.9%	42.1%	32.3%	71.6%	60.3%	60.3%	54.1%
33	13	56.8%	75.5%	64.8%	80.3%	79.7%	73.5%	71.8%
Your Score	14	56.3%	54.1%	62.9%	64.8%	50.7%	51.2%	56.7%
13	15	52.2%	34.9%	61.0%	52.8%	58.9%	48.7%	51.4%
24	16	48.9%	66.7%	86.9%	87.7%	83.6%	74.5%	74.7%
28	17	46.4%	45.5%	19.3%	40.3%	28.8%	32.4%	35.5%
27	18	43.7%	26.5%	31.5%	24.3%	22.2%	17.2%	27.6%
17	19	41.5%	28.4%	50.1%	48.1%	71.1%	81.0%	53.4%
23	20	39.1%	52.3%	57.1%	86.4%	87.7%	88.9%	68.6%
22	21	36.8%	18.7%	19.3%	52.9%	66.4%	64.3%	43.1%
12	22	36.6%	43.2%	33.1%	65.7%	69.0%	86.0%	55.6%
30	23	36.3%	22.6%	23.5%	85.8%	81.5%	70.3%	53.3%
29	24	34.1%	44.9%	50.2%	28.3%	48.9%	36.9%	40.6%
34	25	33.4%	37.9%	23.1%	21.7%	29.7%	22.6%	28.1%
18	26	32.6%	68.4%	80.4%	88.4%	83.8%	91.6%	74.2%
Monthly Average		57.7%	56.8%	56.7%	64.3%	64.0%	66.6%	61.0%

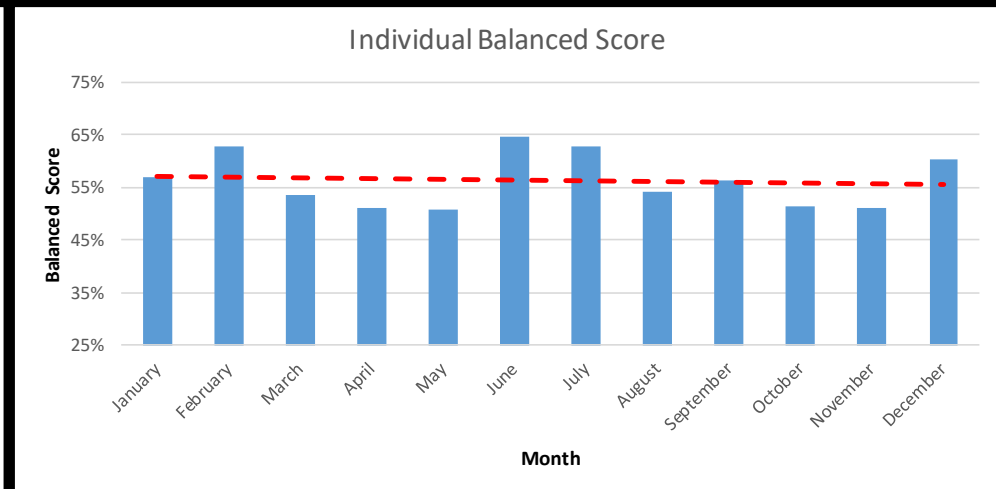
Team Average Balanced Score

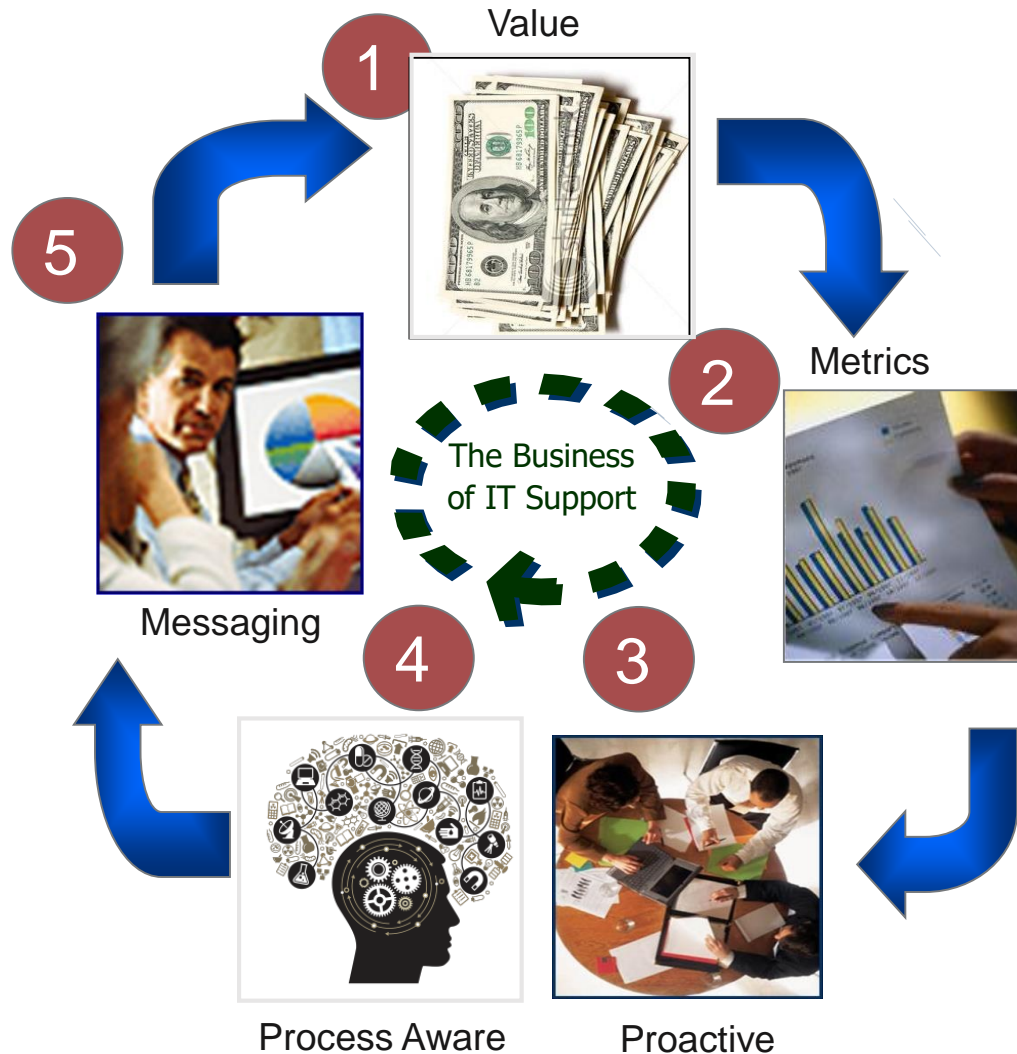


Agent A

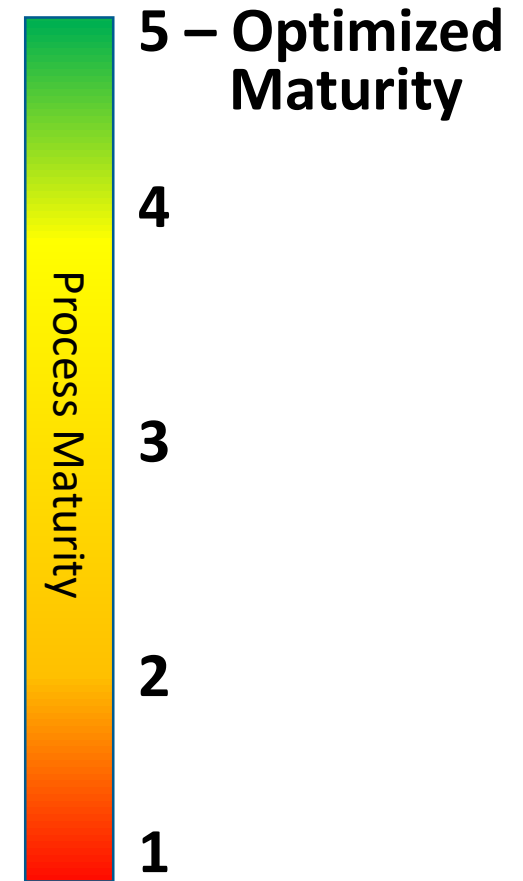
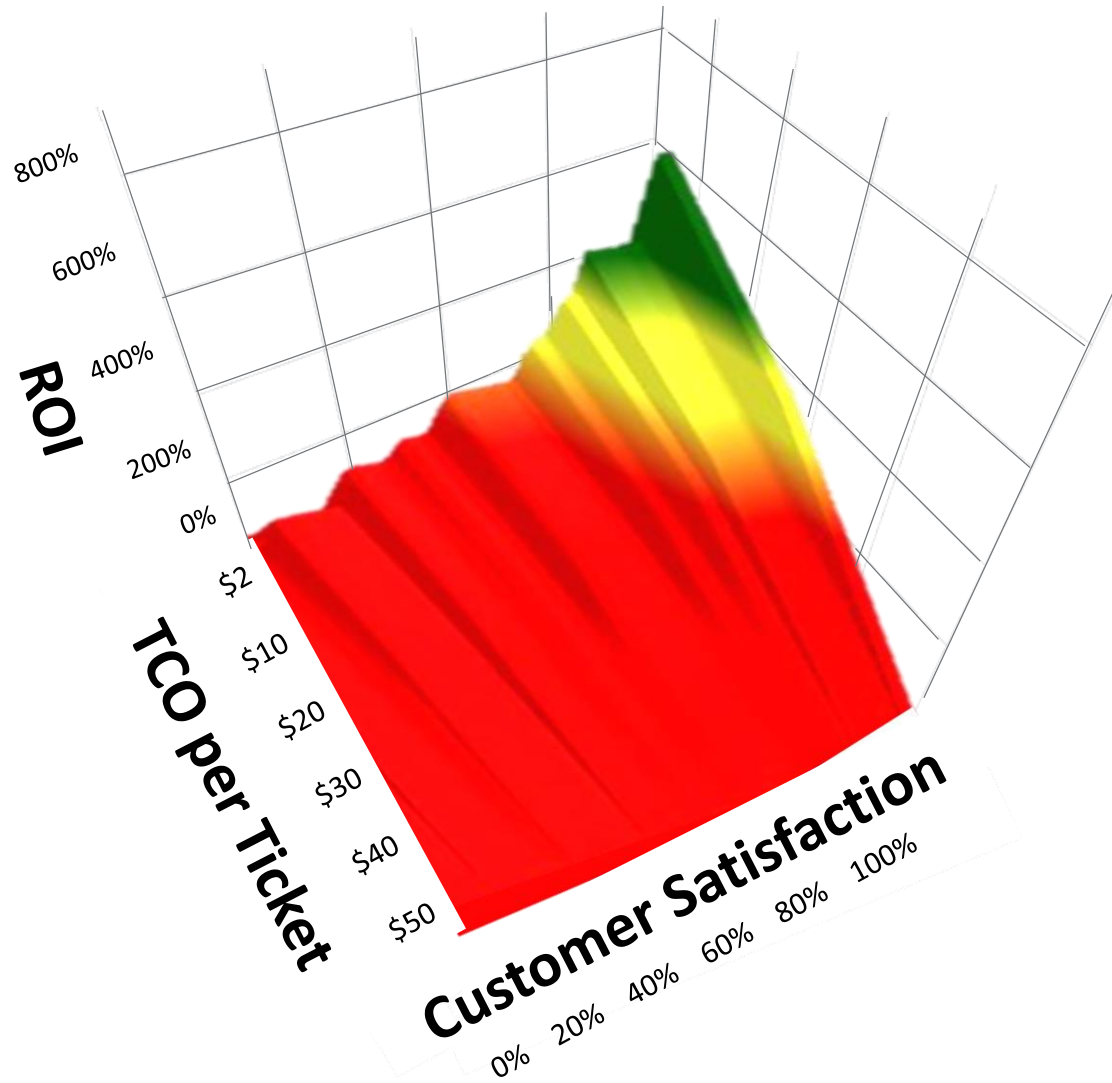


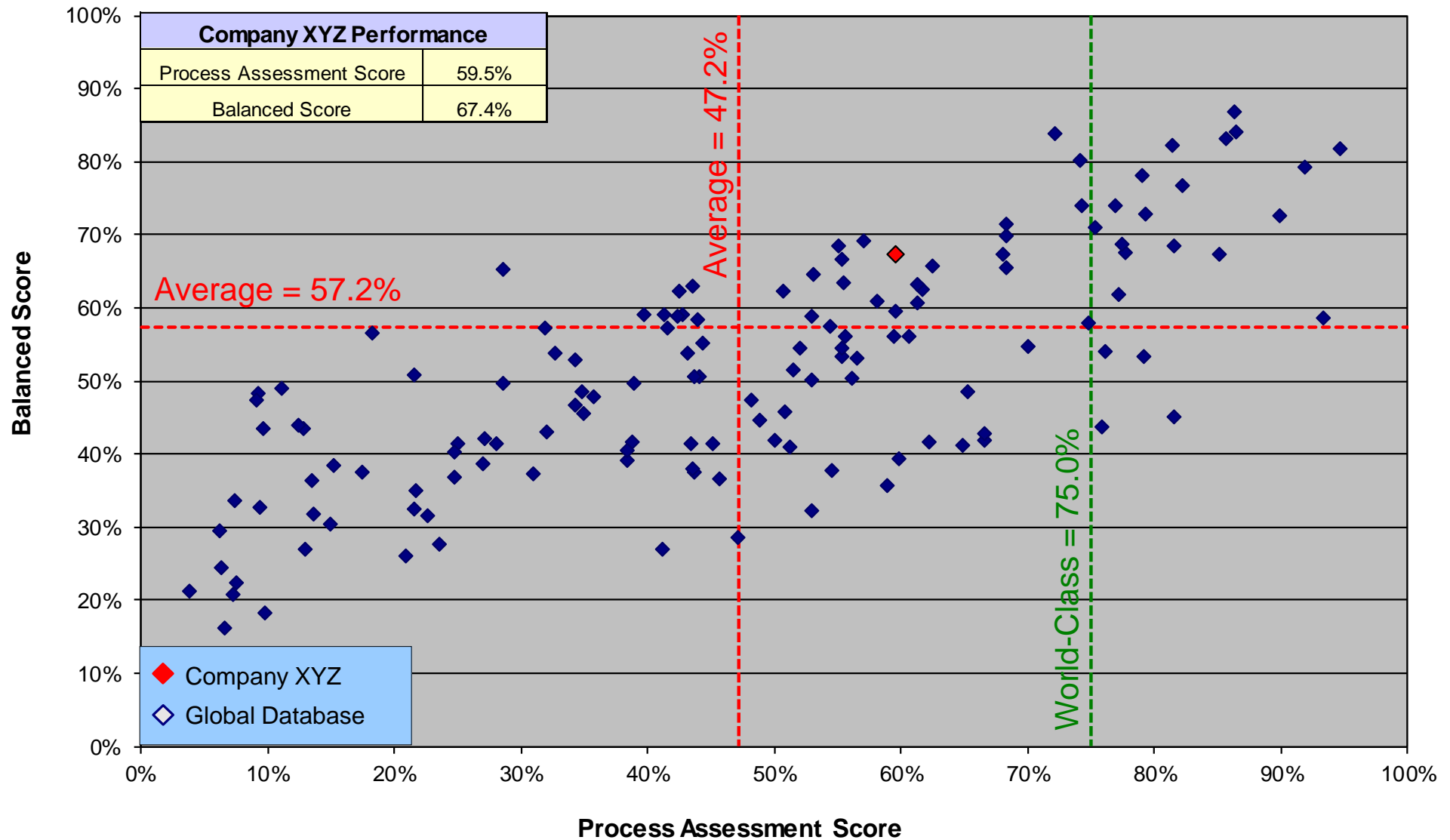
Agent B



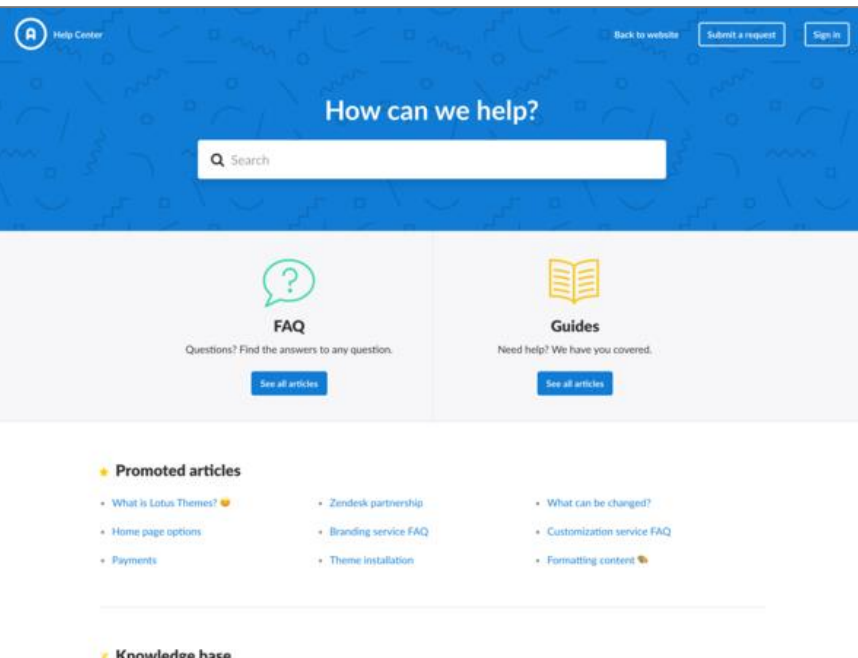


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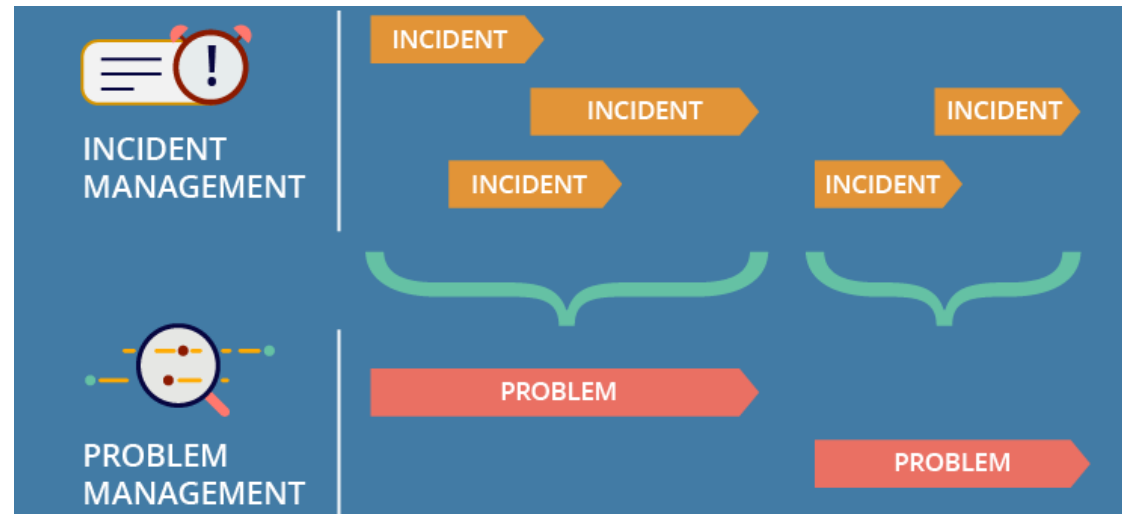
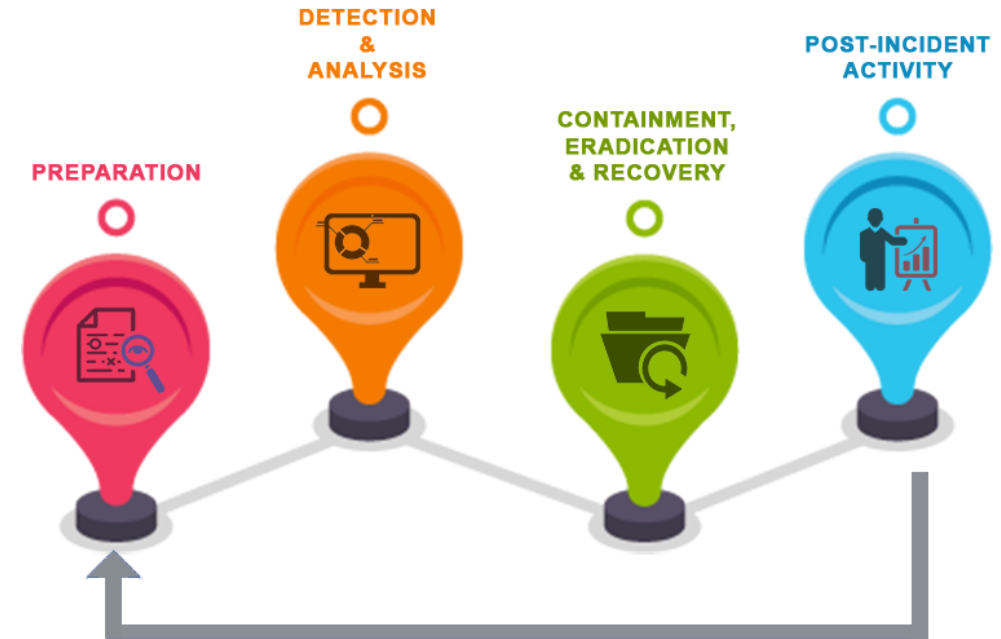




KNOWLEDGE

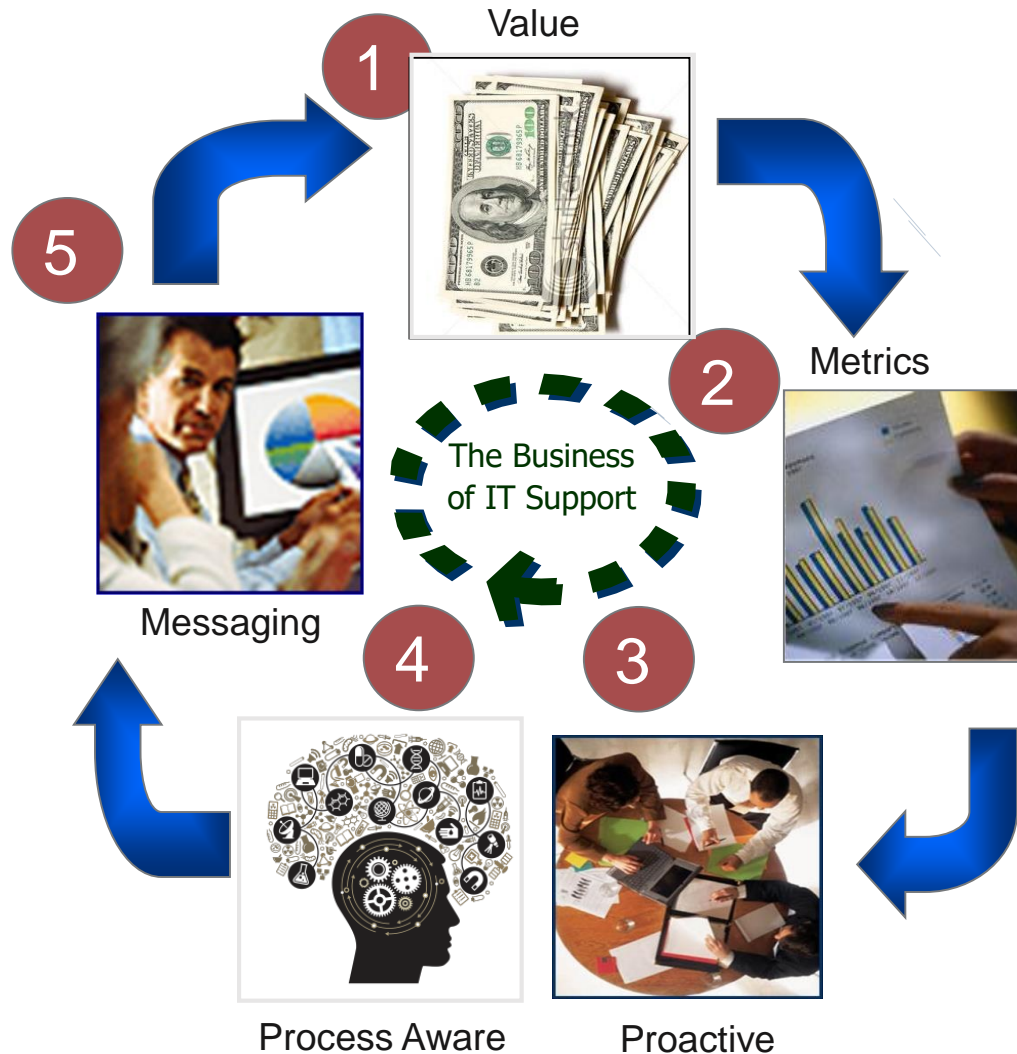


INCIDENT



PROBLEM





Model Component	Description
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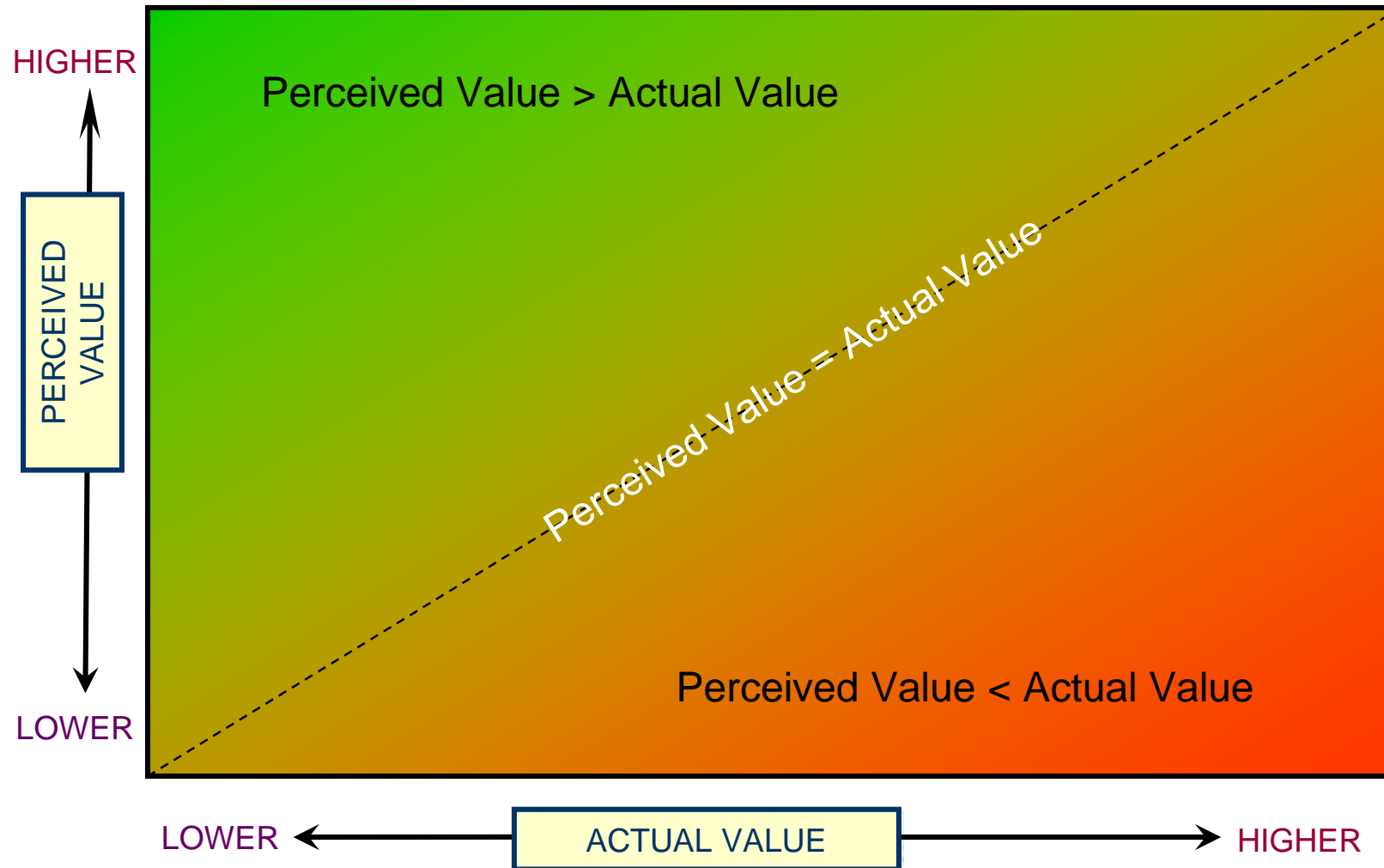
Messaging



We've all heard the expression...

*“Expectations Not Set...
are Expectations Not Met!”*

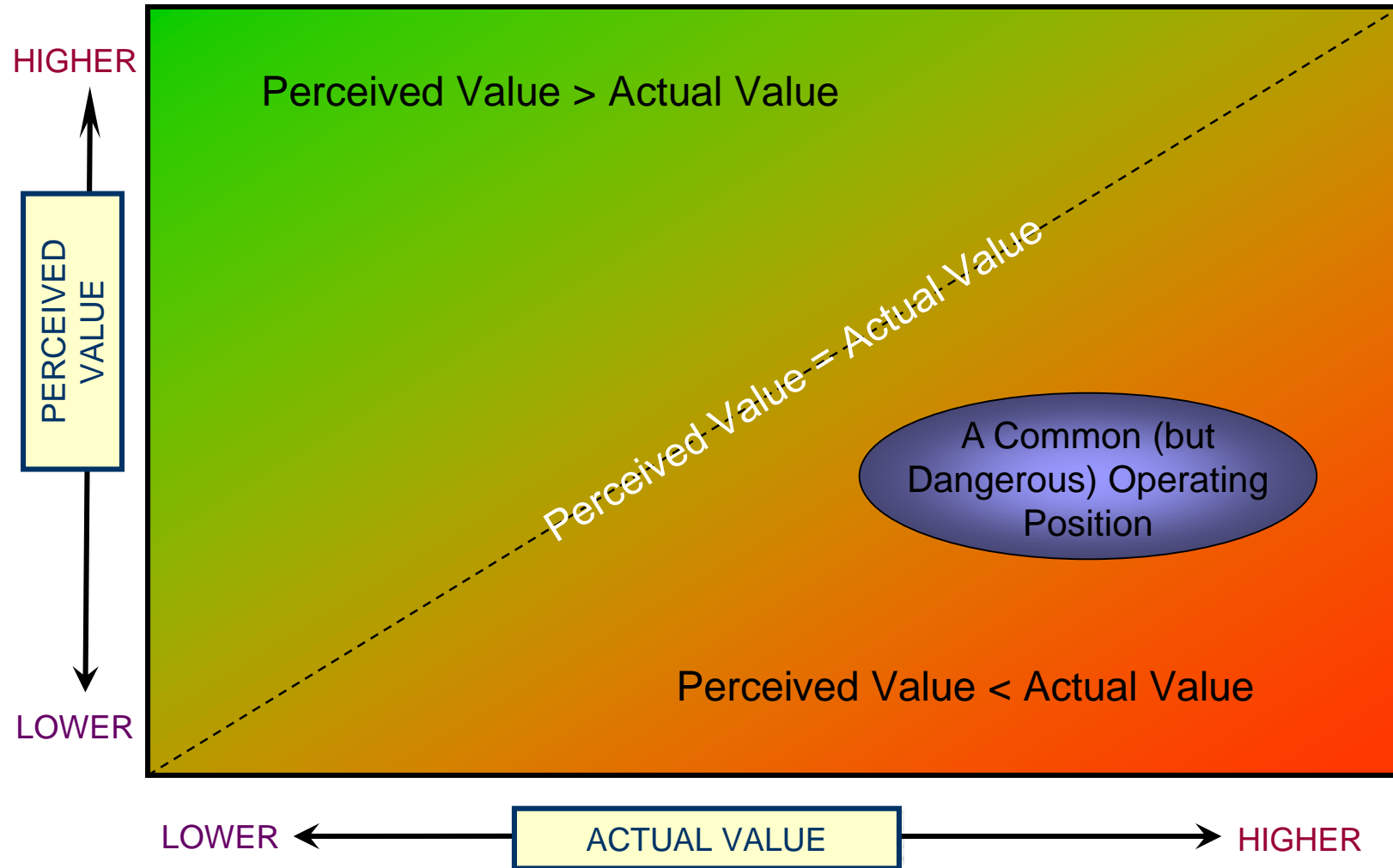
So, let's get serious about proactively managing expectations!

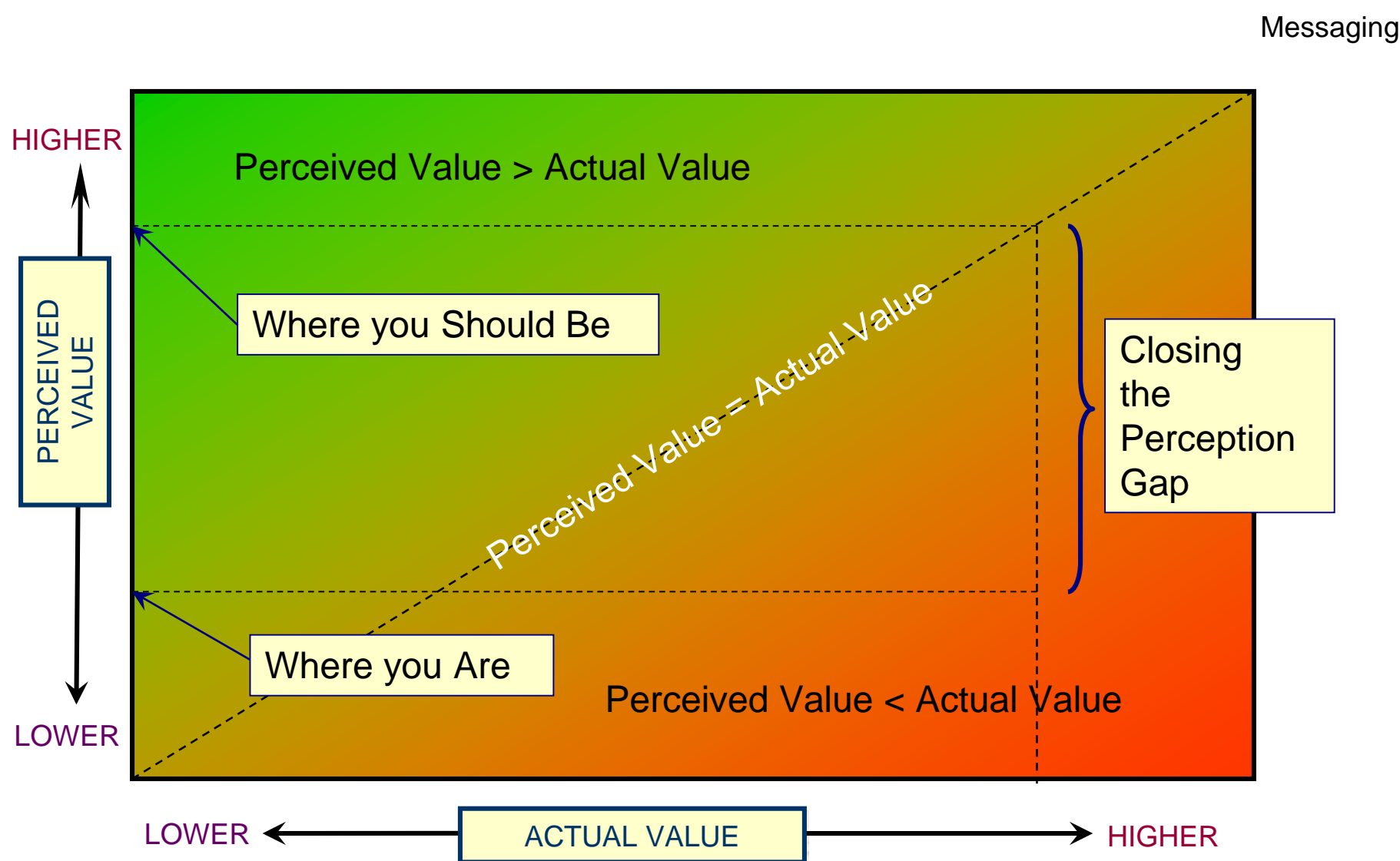


Messaging



Messaging





Messaging



Newsletters	Brown Bag Sessions	Leave Behinds	Business Unit Liaisons																																																			
Surveys	Log-in Screens	Webcasts	FAQ Site																																																			
<p>Survey Results Table:</p> <table><tr><th>Rank</th><th>Fails</th><th>Survey Question</th></tr><tr><td>1 -</td><td>22.1%</td><td>24. Availability of shared resources</td></tr><tr><td>2 -</td><td>16.2%</td><td>30. Your satisfaction with remote access services</td></tr><tr><td>3 -</td><td>14.7%</td><td>17. Continue using the IS Support Center</td></tr><tr><td>4 -</td><td>13.2%</td><td>26. Overall satisfaction with computing/network services</td></tr><tr><td>5 -</td><td>11.8%</td><td>21. The response to requested software changes</td></tr><tr><td>6 -</td><td>11.8%</td><td>29. Satisfaction with the current E-Mail services</td></tr><tr><td>7 -</td><td>10.3%</td><td>09. Current services provided by IS</td></tr><tr><td>8 -</td><td>9.8%</td><td>15. Developers understand your business requirements</td></tr><tr><td>9 -</td><td>9.8%</td><td>23. Reliability of business applications</td></tr><tr><td>10 -</td><td>7.4%</td><td>06. IS communication of products and services</td></tr><tr><td>11 -</td><td>7.4%</td><td>22. The response to requested enhancements</td></tr><tr><td>12 -</td><td>4.4%</td><td>07. IS value compared to the cost of services</td></tr><tr><td>13 -</td><td>4.4%</td><td>duplicate rank 08. IS communication of products and services</td></tr><tr><td>14 -</td><td>4.4%</td><td>20. Responsiveness to application maintenance requests</td></tr><tr><td>15 -</td><td>2.9%</td><td>12. Acquisition process for IT</td></tr><tr><td>16 -</td><td>2.9%</td><td>18. Applications provide the necessary functionality</td></tr></table> <p>Annotations: 'Mean for ALL fails' points to the 'Fails' column. '2.9% of XXX's said issue 18. failed to meet expectations.' points to the bottom row. 'Where is IS failing to meet XXX needs?' points to the 'Survey Question' column.</p>	Rank	Fails	Survey Question	1 -	22.1%	24. Availability of shared resources	2 -	16.2%	30. Your satisfaction with remote access services	3 -	14.7%	17. Continue using the IS Support Center	4 -	13.2%	26. Overall satisfaction with computing/network services	5 -	11.8%	21. The response to requested software changes	6 -	11.8%	29. Satisfaction with the current E-Mail services	7 -	10.3%	09. Current services provided by IS	8 -	9.8%	15. Developers understand your business requirements	9 -	9.8%	23. Reliability of business applications	10 -	7.4%	06. IS communication of products and services	11 -	7.4%	22. The response to requested enhancements	12 -	4.4%	07. IS value compared to the cost of services	13 -	4.4%	duplicate rank 08. IS communication of products and services	14 -	4.4%	20. Responsiveness to application maintenance requests	15 -	2.9%	12. Acquisition process for IT	16 -	2.9%	18. Applications provide the necessary functionality			
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Messaging



- Managing the gap between perception and reality is fairly straightforward
 - It doesn't take a lot of time, or cost a lot of money
- But it is critically important
 - The success of your support organization depends as much on your image, as it does on your actual performance!
- The Benefits of effective Messaging Include:
 - Customer loyalty and positive word-of-mouth referrals
 - Credibility, which leverages your ability to Get Things Done!
 - A Positive Image for IT overall
 - High levels of Customer Satisfaction

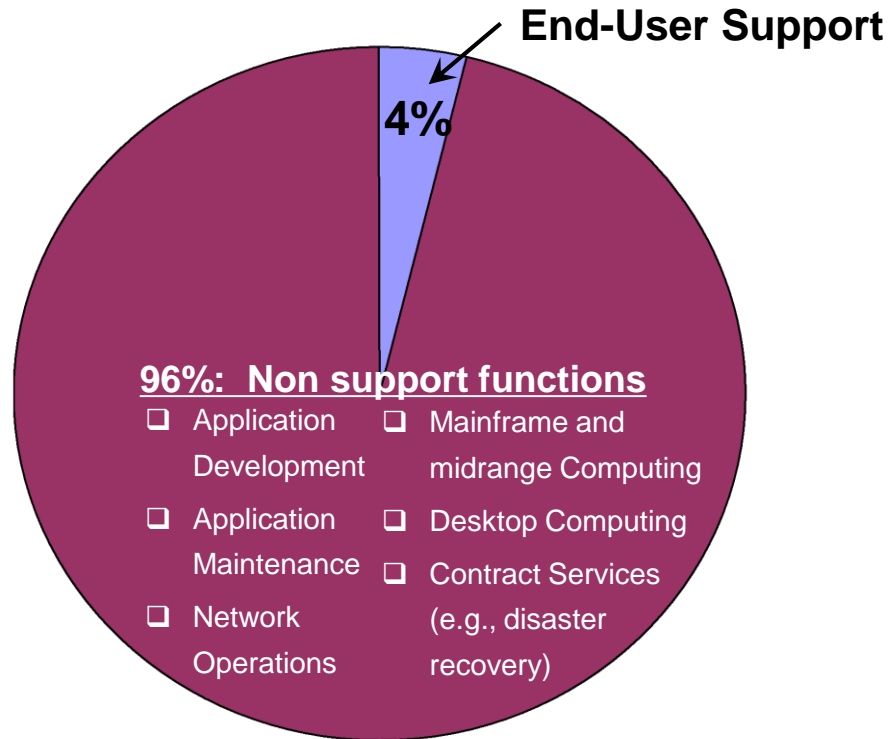
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GET READY FOR THE
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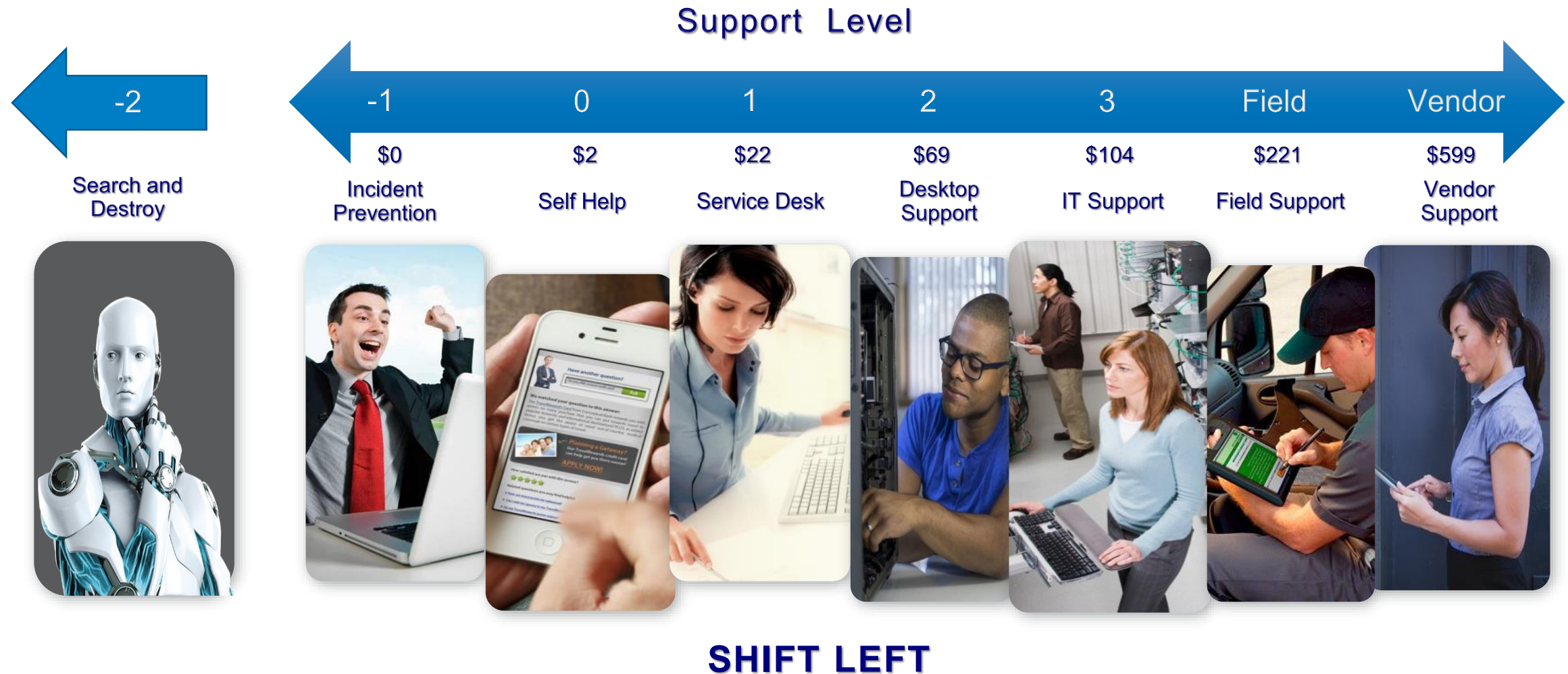
The Paradox of IT Service and Support

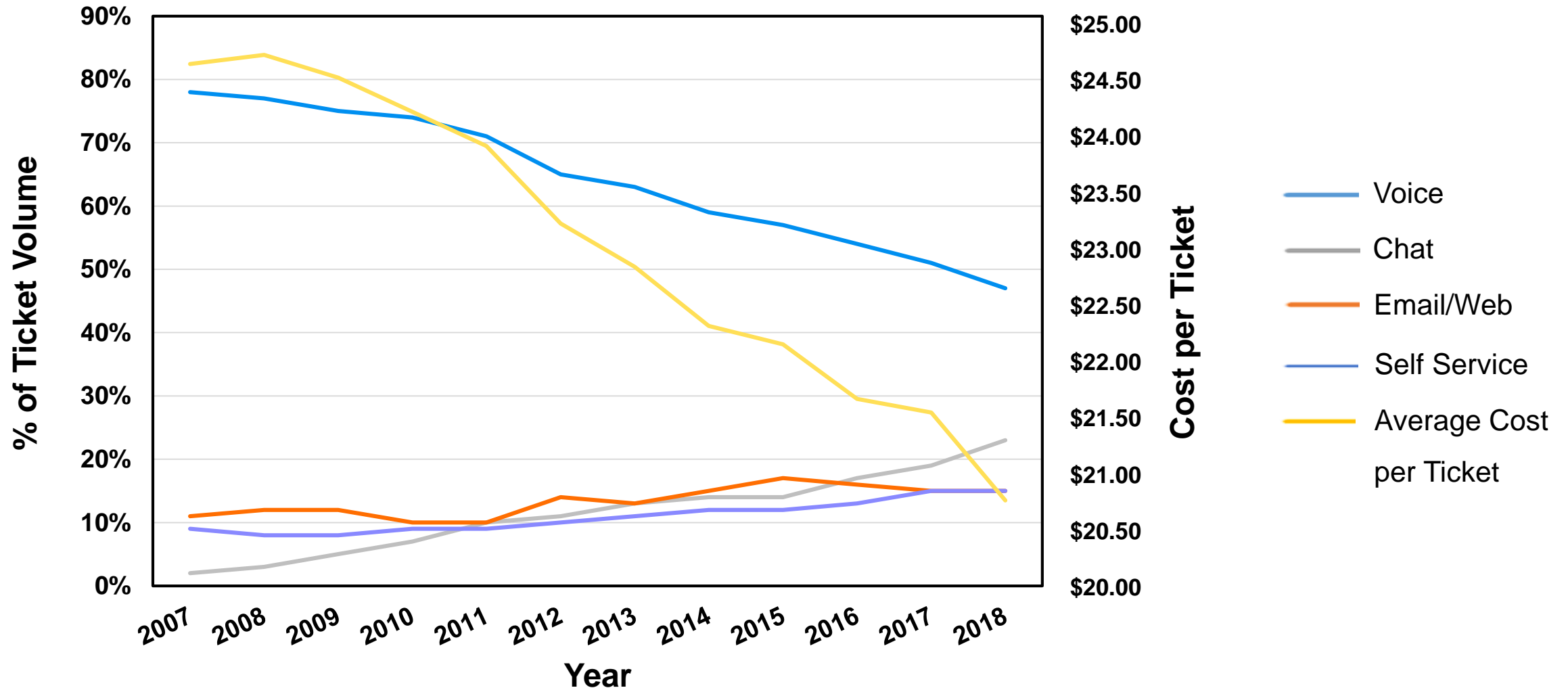
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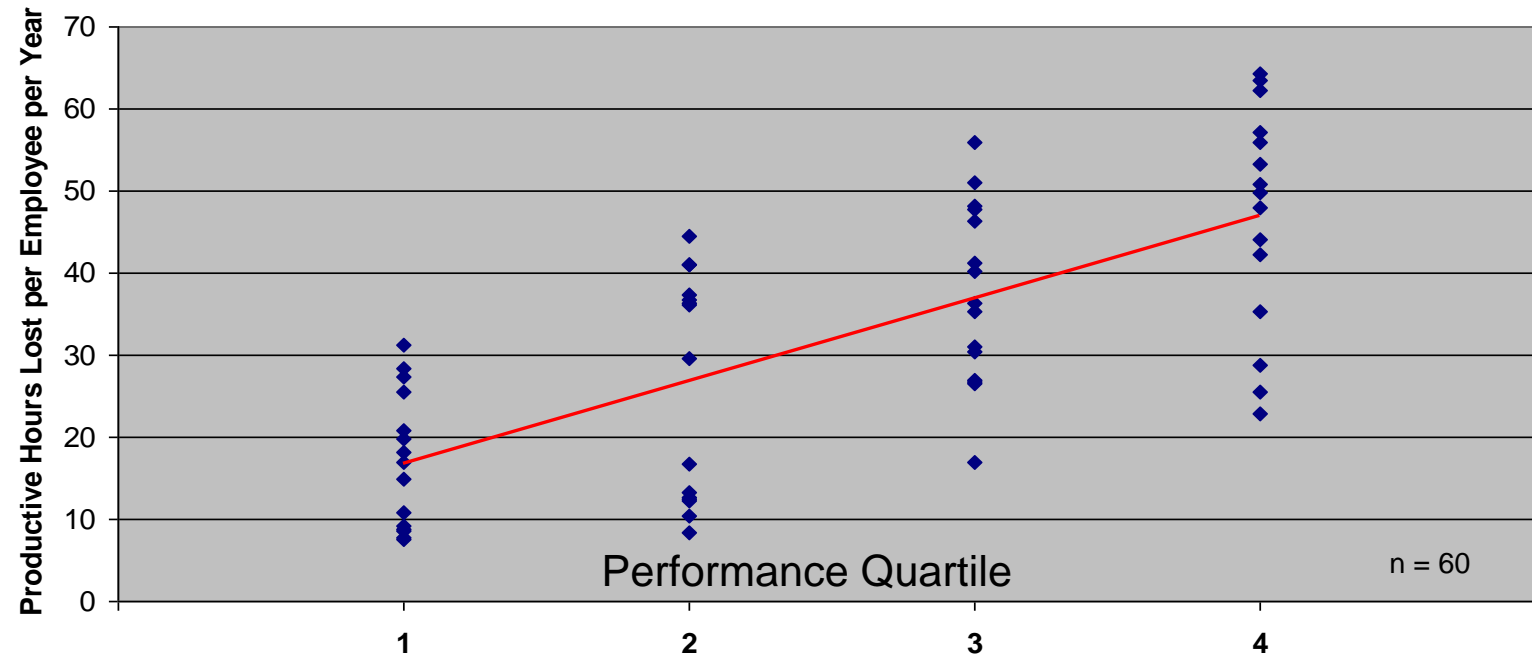


Corporate IT Spending Breakdown

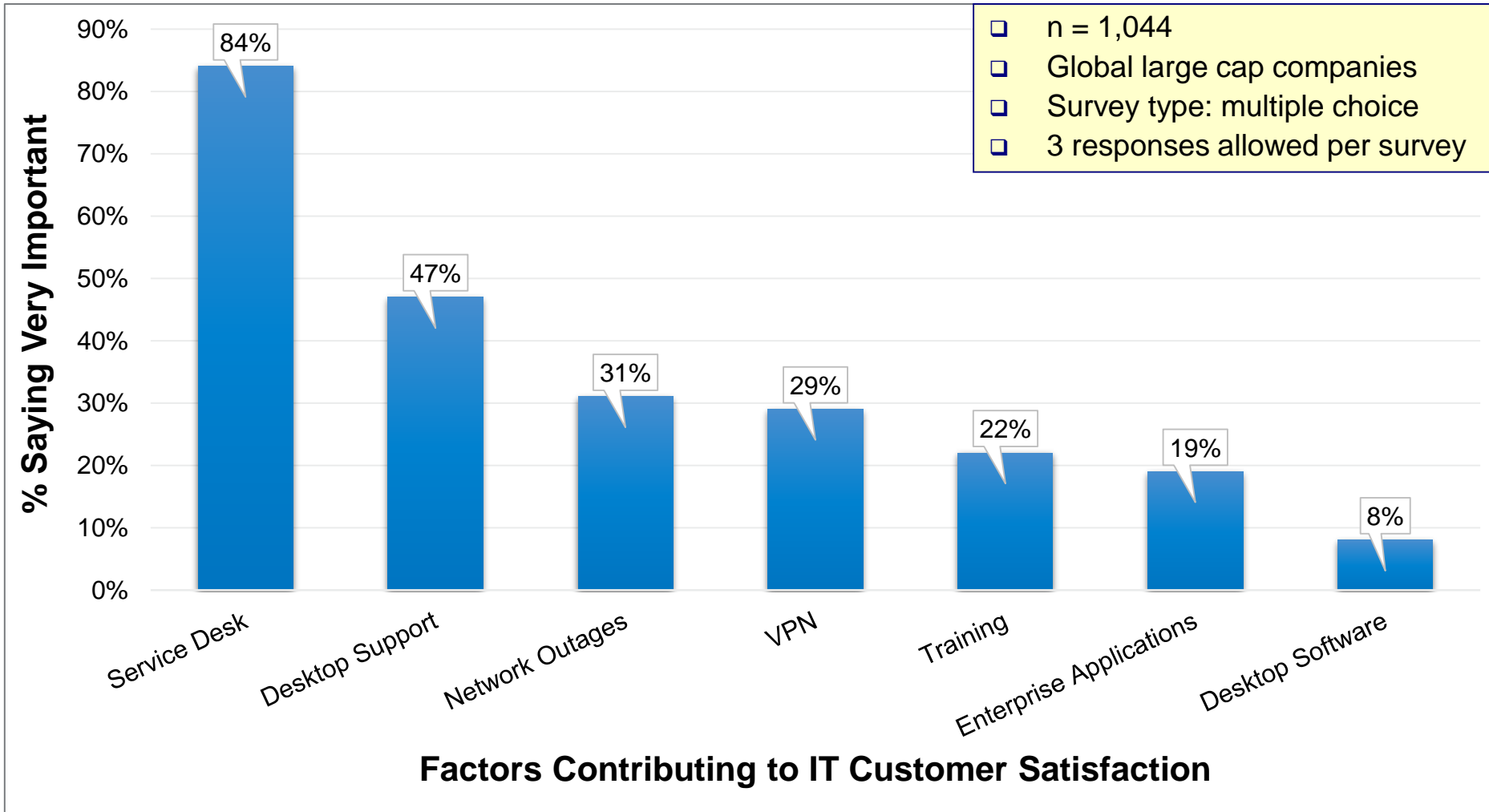
- Less than 5% of all IT spending is allocated to end-user support
 - Service desk, desktop support, field support
- This leads many to erroneously assume that there is little upside opportunity in IT support
- The result is that most support organizations are managed with the goal of minimizing costs
- But the most effective support strategies focus on maximizing value







Support Function	Key Performance Indicator	Performance Quartile			
		1 (top)	2	3	4 (bottom)
Service Desk	Customer Satisfaction	93.5%	84.5%	76.1%	69.3%
	First Contact Resolution Rate	90.1%	83.0%	72.7%	66.4%
	Mean Time to Resolve (hours)	0.8	1.2	3.6	5.0
Desktop Support	Customer Satisfaction	94.4%	89.2%	79.0%	71.7%
	First Contact Resolution Rate	89.3%	85.6%	80.9%	74.5%
	Mean Time to Resolve (hours)	2.9	4.8	9.4	12.3
Average Productive Hours Lost per Employee per Year		17.1	25.9	37.4	46.9



- 84% cited the **service desk** as a very important factor in their overall satisfaction with corporate IT
- 47% cited **desktop support** as a very important factor in their overall satisfaction with corporate IT



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**Session 205: Radical Success: Managing
Service and Support as a Business**

Jeff Rumburg


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Service Desk KPIs
Definitions & Correlations



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:


- > Cost
- > Productivity
- > Service Level
- > Quality
- > Agent
- > Contact Handling

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Desktop Support KPIs
Definitions & Correlations



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:

- > Cost
- > Productivity
- > Service Level
- > Quality
- > Technician
- > Ticket Handling
- > Workload

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Session 501: Metrics Magic: Ask the Experts!

Rae Ann Bruno | John Custy | Jeff Rumburg

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About MetricNet

Your Benchmarking Partner

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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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Benchmarking is MetricNet's Core Business

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- Desktop Support
- Field Support

Call Centers

- Customer Service
- Technical Support
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- Collections

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Satisfaction

- Customer Satisfaction
- Employee Satisfaction



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