Company XYZ
Peer Group Service Desk Benchmark

MetricNet™
Performance Benchmarking

Company XYZ

Report Contents

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Project Overview and Objectives

Company XYZ

Project Objectives

- Review and assess the performance of the Company XYZ Service Desk

- Benchmark the performance of Company XYZ against a peer group of comparable Service Desks

- Complete a Best Practices Process Assessment of the Company XYZ Service Desk

- Recommend strategies for improved performance

- Achieve world-class levels of support

- Maximize customer satisfaction

Project Approach

Module 1: Company XYZ Baselining / Data Collection

Module 2: Benchmarking and Gap Analysis

Module 3: Balanced Scorecard

Module 4: Best Practices Process Assessment

Module 5: Strategies for Improved Performance

Module 6: Report Development and Presentation of Results

Module 1: Company XYZ Baselining/Data Collection

- **Core Topics**

  - ☐ Project Kickoff

  - ☐ Data Collection

  - ☐ Interviews

Project Kickoff Meeting

Company XYZ
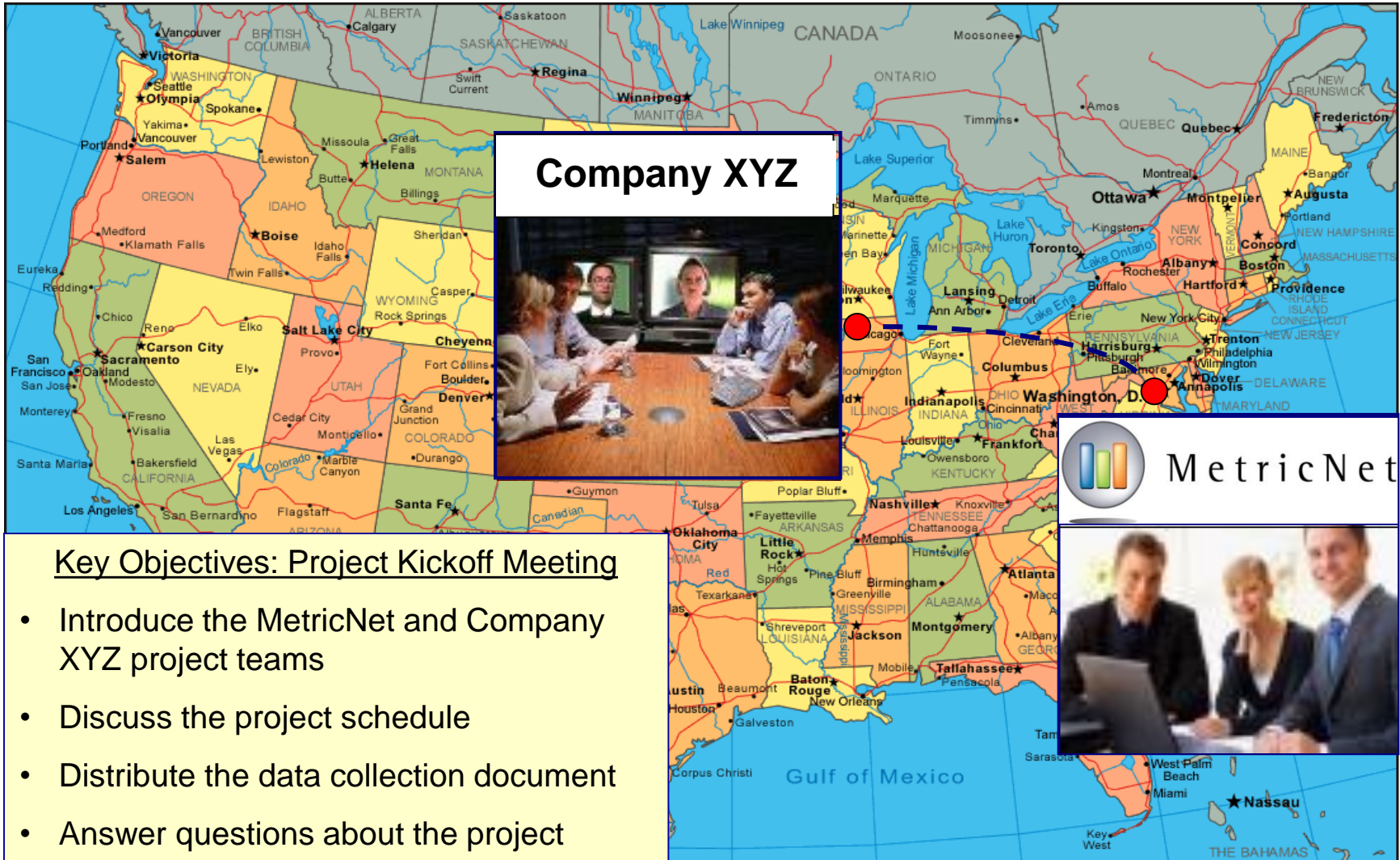
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Key Objectives: Project Kickoff Meeting

- Introduce the MetricNet and Company XYZ project teams

- Discuss the project schedule

- Distribute the data collection document

- Answer questions about the project

Data Collection

Interviews

Company XYZ

Interviews

- Technicians, team leads, supervisors
- QA/QC, Workforce schedulers, trainers

Module 2: Benchmarking and Gap Analysis

- Core Topics

  - ☐ Peer Group Selection

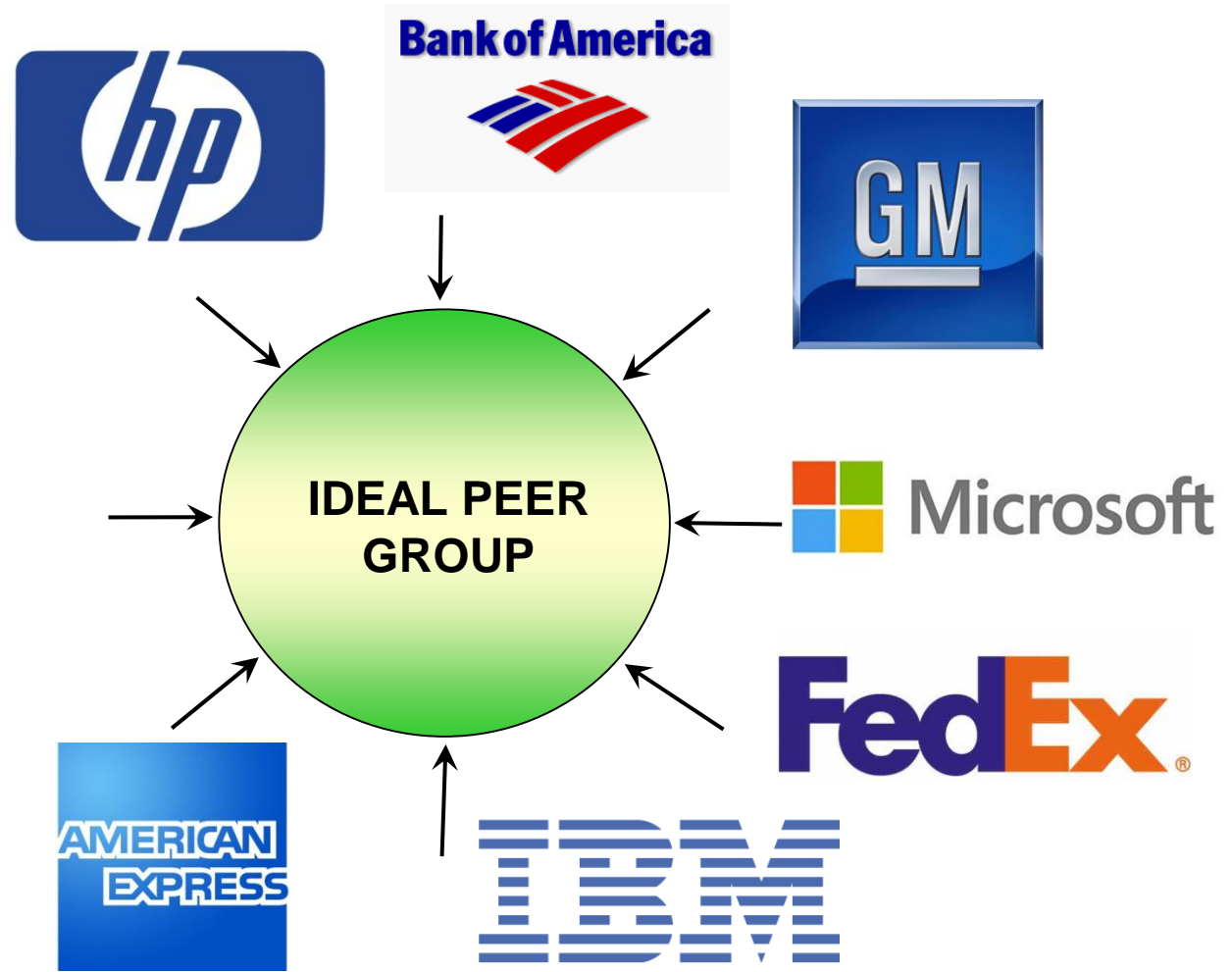 - ☐ Benchmarking Comparison

  - ☐ Gap Analysis

Peer Group Selection

| Scope |
| Scale |
| Complexity |
| Geography |

IDEAL PEER GROUP

Read MetricNet's whitepaper on *Benchmarking Peer Group Selection*. Go to www.metricnet.com to get your copy!

Dynamic Peer Group Selection

Scope

Scope refers to the services offered by the Service Desk. The broader the scope of services offered, the broader the skill set required by the agents. As scope increases, so too does the cost of providing support. The Service Desks selected for benchmarking comparison must be comparable in the scope of services offered.

Scale

Volume refers to the number of contacts handled by the Service Desk. Virtually everything in the Service Desk is subject to scale economies. This is particularly true when it comes to the volume of contacts handled. The approximate scale effect for volume is 5%. What this means is that every time the number of transactions doubles, you should expect to see the cost per contact decline by 5%. For this reason, it is important to select benchmarking peer groups that are similar in scale.

Complexity

The complexity of transactions handled will influence the handle time, and hence the cost per transaction. For example, a password reset is a simple transaction that takes very little time, and costs very little to resolve. By contrast, an inquiry for a complex application like SAP takes much longer and costs much more to resolve. MetricNet uses a proprietary algorithm to determine a weighted complexity index based upon the mix of transactions handled by a Service Desk. The companies chosen for a benchmarking peer group will have similar complexity factors.

Geography

The main factor that is affected by geography is cost; specifically labor cost. Since labor accounts for 65% of service desk operating expense, it is important to benchmark service desks that have a common geography. Even within a particular geography, wage rates can differ significantly, so MetricNet makes adjustments to ensure that each Service Desk in a benchmarking peer group is normalized to the same wage rate.

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Service Desk Benchmark: Key Questions Answered

Key Questions

- How is your Service Desk performing?

- How does your Service Desk compare to other comparable Service Desks?

- What are the strengths and weaknesses of your Service Desk?

- What are the areas of improvement for your Service Desk?

- How can you enhance Service Desk performance and achieve world-class status?

MetricNet's Benchmarking Database

Company XYZ Service Desk Data

Service Desk Benchmark

Gap Analysis

Improvement Recommendations

Realized Performance Gains

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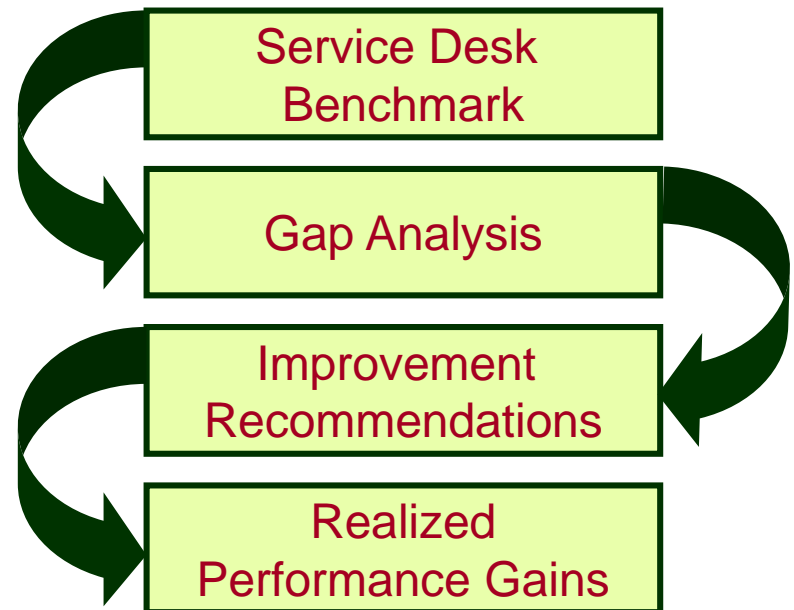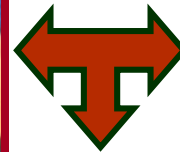
The Benchmarking Methodology

Company XYZ Service Desk Performance ⟵ **COMPARE** ⟶ Performance of Benchmarking Peer Group

Determine How Best in Class Achieve Superiority

Adopt Selected Practices of Best in Class

Build a Sustainable Competitive Advantage

The ultimate objective of benchmarking
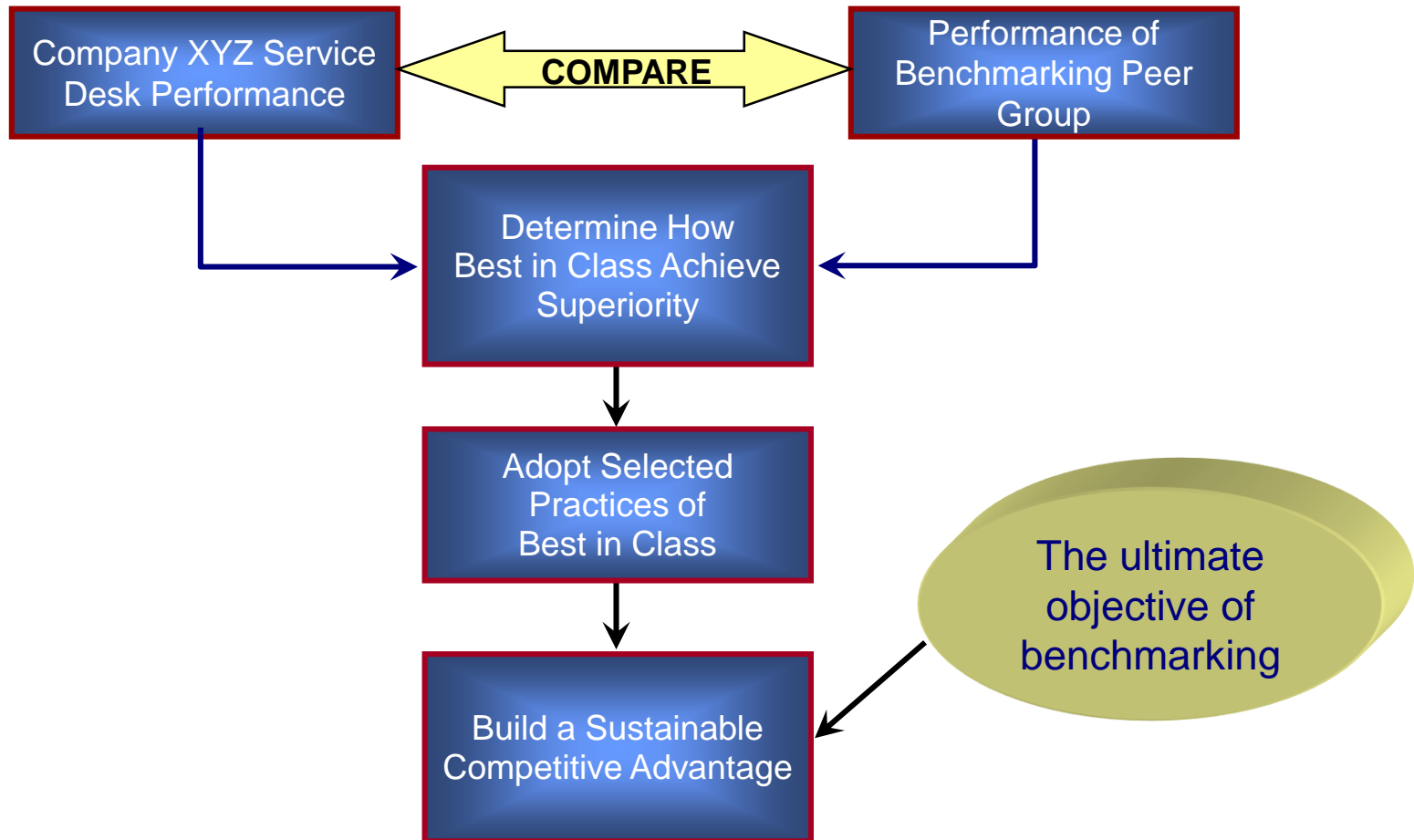
Read MetricNet's whitepaper on *Service Desk Benchmarking*. Go to www.metricnet.com to receive your copy!

Summary of Included Benchmarking Metrics

Cost

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

Quality

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

Productivity

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

Tech

- ❑ Annual Technician Turnover
- ❑ Daily Technician Absenteeism
- ❑ Schedule Adherence
- ❑ New Technician Training Hours
- ❑ Annual Technician Training Hours
- ❑ Technician Tenure
- ❑ Technician Job Satisfaction

Service Level

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

Call Handling

- ❑ Inbound Contact Handle Time
- ❑ User Self-Service Completion Rate

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Benchmarking KPI Performance Summary

Metric Type	Key Performance Indicator (KPI)	Company XYZ	Peer Group Statistics			
			Average	Min	Median	Max
Cost	Cost per Inbound Contact	$8.42	$11.93	$7.09	$11.40	$20.50
	Cost per Minute of Inbound Handle Time	$1.46	$1.64	$1.03	$1.54	$2.43
	Price per Inbound Contact (PC Helps)	$14.59	$15.84	$7.54	$14.62	$24.28
	Price per Minute of Handle Time (PC Helps)	$1.87	$2.07	$1.25	$2.02	$3.51
	First Level Resolution Rate	N/A	82.3%	73.7%	82.9%	97.5%
Productivity	Inbound Contacts per Technician per Month	910	591	329	574	910
	Technician Utilization	54.9%	48.1%	30.8%	50.3%	62.7%
	Technicians as a % of Total Headcount	79.0%	84.5%	75.2%	83.5%	93.7%
Service Level	Average Speed of Answer (ASA) (seconds)	124	71	20	71	129
	% of Calls Answered in 30 Seconds	2.6%	43.9%	2.6%	44.4%	85.8%
	Call Abandonment Rate	15.3%	6.4%	1.1%	5.9%	15.3%
Quality	Call Quality	N/A	83.7%	65.1%	83.9%	94.5%
	First Contact Resolution Rate	57.6%	71.6%	57.6%	70.4%	91.4%
	Customer Satisfaction	87.6%	78.2%	63.1%	76.1%	96.7%
Technician	Annual Technician Turnover	31.3%	40.7%	13.6%	40.3%	65.6%
	Daily Technician Absenteeism	10.3%	10.8%	4.7%	10.1%	24.2%
	Schedule Adherence	89.7%	83.4%	72.7%	83.8%	90.8%
	New Technician Training Hours	100	128	67	125	238
	Annual Technician Training Hours	24	16	0	12	74
	Technician Tenure (months)	25.0	33.2	17.6	28.2	86.9
	Technician Job Satisfaction	99.0%	70.3%	53.3%	66.8%	99.0%
Contact Handling	Inbound Contact Handle Time (minutes)	5.75	7.18	5.29	7.35	9.08
	User Self-Serve Completion Rate	0.0%	9.2%	0.0%	7.9%	25.2%

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Cost vs. Quality for Company XYZ Service Desk

Module 3: Balanced Scorecard

- Core Topics

  - ☐ Metrics Selection

  - ☐ Metric Weightings

  - ☐ Scorecard Construction

The Service Desk Scorecard: An Overview

- The Service Desk scorecard employs a methodology that provides you with a single, all-inclusive measure of your Service Desk performance

- It combines cost, service level, productivity, and quality metrics into an overall performance indicator for your Service Desk

- Your Service Desk score will range between 0 and 100%, and can be compared directly to the scores of other Service Desks in the benchmark

- By computing your overall score on a monthly or quarterly basis, you can track and trend your performance over time

- Charting and tracking your Service Desk score is an ideal way to ensure continuous improvement in your Service Desk!

The Service Desk Scorecard

Performance Metric	Metric Weighting	Performance Range		Your Performance	Metric Score	Balanced Score
		Worst Case	Best Case			
Cost per Inbound Contact	25.0%	$20.50	$7.09	$8.42	90.1%	22.5%
Customer Satisfaction	25.0%	63.1%	96.7%	87.6%	72.9%	18.2%
Technician Utilization	15.0%	30.8%	62.7%	54.9%	75.5%	11.3%
First Contact Resolution Rate	15.0%	57.6%	91.4%	57.6%	0.0%	0.0%
Technician Job Satisfaction	10.0%	53.3%	99.0%	99.0%	100.0%	10.0%
% of Calls Answered in 30 Seconds	10.0%	2.6%	85.8%	2.6%	0.0%	0.0%
Total	100.0%	N/A	N/A	N/A	N/A	62.1%

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: (worst case – actual performance) / (worst case – best case) X 100

Step 6

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

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Balanced Scorecard Summary*

Key Statistics	
Service Desk Scores	
High	63.8%
Average -----	50.2%
Median	47.2%
Low	31.6%
Company XYZ	62.1%

*The scores shown in the chart are based upon the performance metrics, weightings, and data ranges shown on the previous page.

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Scorecard Performance Rankings

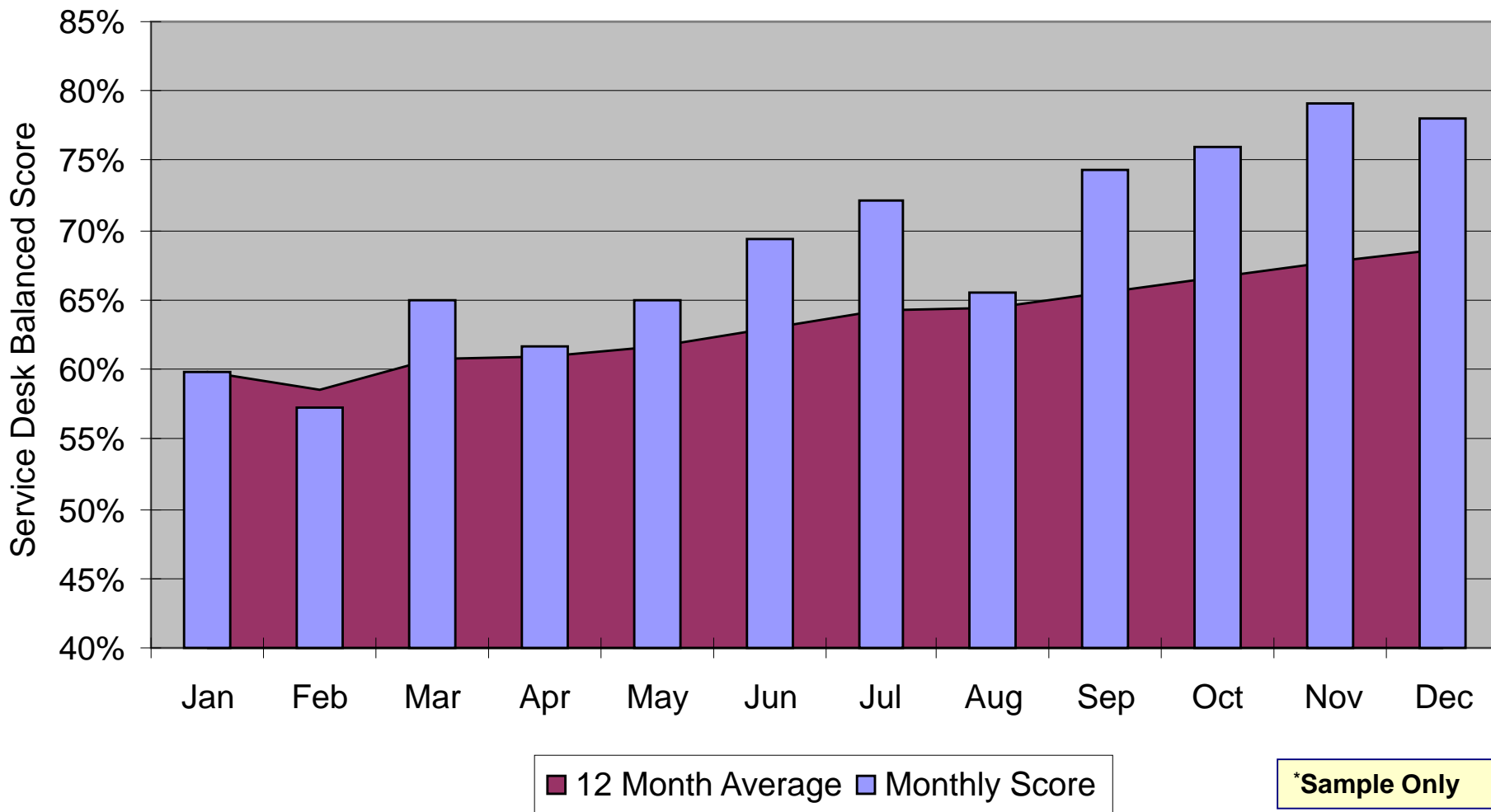|		Scorecard Metrics						
Overall Ranking	Service Desk Number	Cost per Inbound Contact	Customer Satisfaction	Technician Utilization	First Contact Resolution Rate	Technician Job Satisfaction	% of Calls Answered in 30 Seconds	Total Balanced Score
1	6	$17.55	90.2%	50.8%	91.4%	88.3%	53.1%	63.8%
2	9	$8.18	84.7%	52.4%	68.5%	74.7%	40.3%	63.2%
3	21	$17.93	96.7%	35.2%	90.0%	89.8%	73.0%	62.7%
4	13	$12.00	85.2%	48.5%	78.8%	78.5%	60.2%	62.5%
5	Company XYZ	$8.42	87.6%	54.9%	57.6%	99.0%	2.6%	62.1%
6	22	$8.32	79.4%	55.5%	73.1%	71.8%	27.4%	60.4%
7	3	$8.44	81.8%	56.9%	71.1%	66.8%	17.1%	59.4%
8	5	$8.34	74.2%	47.9%	70.4%	65.6%	62.1%	54.5%
9	18	$9.24	74.6%	53.3%	71.1%	65.3%	44.4%	53.8%
10	14	$13.09	75.2%	52.6%	72.3%	72.3%	49.1%	49.3%
11	11	$7.09	72.2%	57.8%	64.8%	53.3%	16.4%	49.3%
12	1	$10.26	76.0%	47.8%	67.5%	66.2%	29.8%	47.2%
13	7	$10.53	66.2%	52.9%	72.9%	66.0%	53.0%	46.9%
14	8	$13.69	81.4%	36.3%	75.1%	66.8%	60.4%	46.6%
15	19	$13.99	86.7%	45.3%	68.7%	55.3%	37.8%	46.1%
16	20	$8.25	63.1%	47.5%	69.1%	61.7%	65.8%	45.2%
17	10	$12.59	76.1%	50.3%	68.1%	72.2%	23.7%	44.9%
18	12	$10.22	67.3%	62.7%	63.5%	57.0%	23.6%	43.2%
19	2	$12.45	78.2%	39.8%	69.1%	63.2%	42.4%	42.5%
20	17	$15.65	82.0%	42.3%	66.7%	68.0%	50.0%	41.5%
21	16	$11.40	68.9%	50.8%	67.8%	57.6%	35.4%	40.1%
22	15	$16.27	75.2%	33.7%	74.9%	79.2%	56.6%	38.1%
23	4	$20.50	75.5%	30.8%	73.2%	78.3%	85.8%	31.6%
Key Statistics	Average	$11.93	78.2%	48.1%	71.6%	70.3%	43.9%	50.2%
	Max	$20.50	96.7%	62.7%	91.4%	99.0%	85.8%	63.8%
	Min	$7.09	63.1%	30.8%	57.6%	53.3%	2.6%	31.6%
	Median	$11.40	76.1%	50.3%	70.4%	66.8%	44.4%	47.2%

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KPI Data in Rank Order

	Cost per Inbound Contact	Customer Satisfaction	Technician Utilization	First Contact Resolution Rate	Technician Job Satisfaction	% of Calls Answered in 30 Seconds	Total Balanced Score
Scorecard Metrics							
Company XYZ	$8.42	87.6%	54.9%	57.6%	99.0%	2.6%	62.1%
Ranking	6	3	5	23	1	23	5
Quartile	1	1	1	4	1	4	1
1	$7.09	96.7%	62.7%	91.4%	99.0%	85.8%	63.8%
2	$8.18	90.2%	57.8%	90.0%	89.8%	73.0%	63.2%
3	$8.25	87.6%	56.9%	78.8%	88.3%	65.8%	62.7%
4	$8.32	86.7%	55.5%	75.1%	79.2%	62.1%	62.5%
5	$8.34	85.2%	54.9%	74.9%	78.5%	60.4%	62.1%
6	$8.42	84.7%	53.3%	73.2%	78.3%	60.2%	60.4%
7	$8.44	82.0%	52.9%	73.1%	74.7%	56.6%	59.4%
8	$9.24	81.8%	52.6%	72.9%	72.3%	53.1%	54.5%
9	$10.22	81.4%	52.4%	72.3%	72.2%	53.0%	53.8%
10	$10.26	79.4%	50.8%	71.1%	71.8%	50.0%	49.3%
11	$10.53	78.2%	50.8%	71.1%	68.0%	49.1%	49.3%
12	$11.40	76.1%	50.3%	70.4%	66.8%	44.4%	47.2%
13	$12.00	76.0%	48.5%	69.1%	66.8%	42.4%	46.9%
14	$12.45	75.5%	47.9%	69.1%	66.2%	40.3%	46.6%
15	$12.59	75.2%	47.8%	68.7%	66.0%	37.8%	46.1%
16	$13.09	75.2%	47.5%	68.5%	65.6%	35.4%	45.2%
17	$13.69	74.6%	45.3%	68.1%	65.3%	29.8%	44.9%
18	$13.99	74.2%	42.3%	67.8%	63.2%	27.4%	43.2%
19	$15.65	72.2%	39.8%	67.5%	61.7%	23.7%	42.5%
20	$16.27	68.9%	36.3%	66.7%	57.6%	23.6%	41.5%
21	$17.55	67.3%	35.2%	64.8%	57.0%	17.1%	40.1%
22	$17.93	66.2%	33.7%	63.5%	55.3%	16.4%	38.1%
23	$20.50	63.1%	30.8%	57.6%	53.3%	2.6%	31.6%
Average	$11.93	78.2%	48.1%	71.6%	70.3%	43.9%	50.2%
Max	$20.50	96.7%	62.7%	91.4%	99.0%	85.8%	63.8%
Min	$7.09	63.1%	30.8%	57.6%	53.3%	2.6%	31.6%
Median	$11.40	76.1%	50.3%	70.4%	66.8%	44.4%	47.2%

The Scorecard Can be Updated Monthly*

Legend: ■ 12 Month Average ■ Monthly Score

*Sample Only

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Module 4: Best Practices Process Assessment

- **Core Components**

  - ☐ Company XYZ Self Assessment

  - ☐ MetricNet Maturity Ranking

  - ☐ Process Assessment Rollup

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Six-Part Model for Service Desk Best Practices

Model Component	Definition
Strategy	Defining Your Charter and Mission
Human Resources	Proactive, Life-cycle Management of Personnel
Process	Expeditious Delivery of Customer Service
Technology	Leveraging People and Processes
Performance Measurement	A Holistic Approach to Performance Measurement
Stakeholder Communication	Proactively Managing Stakeholder Expectations

Best Practices Evaluation Criteria

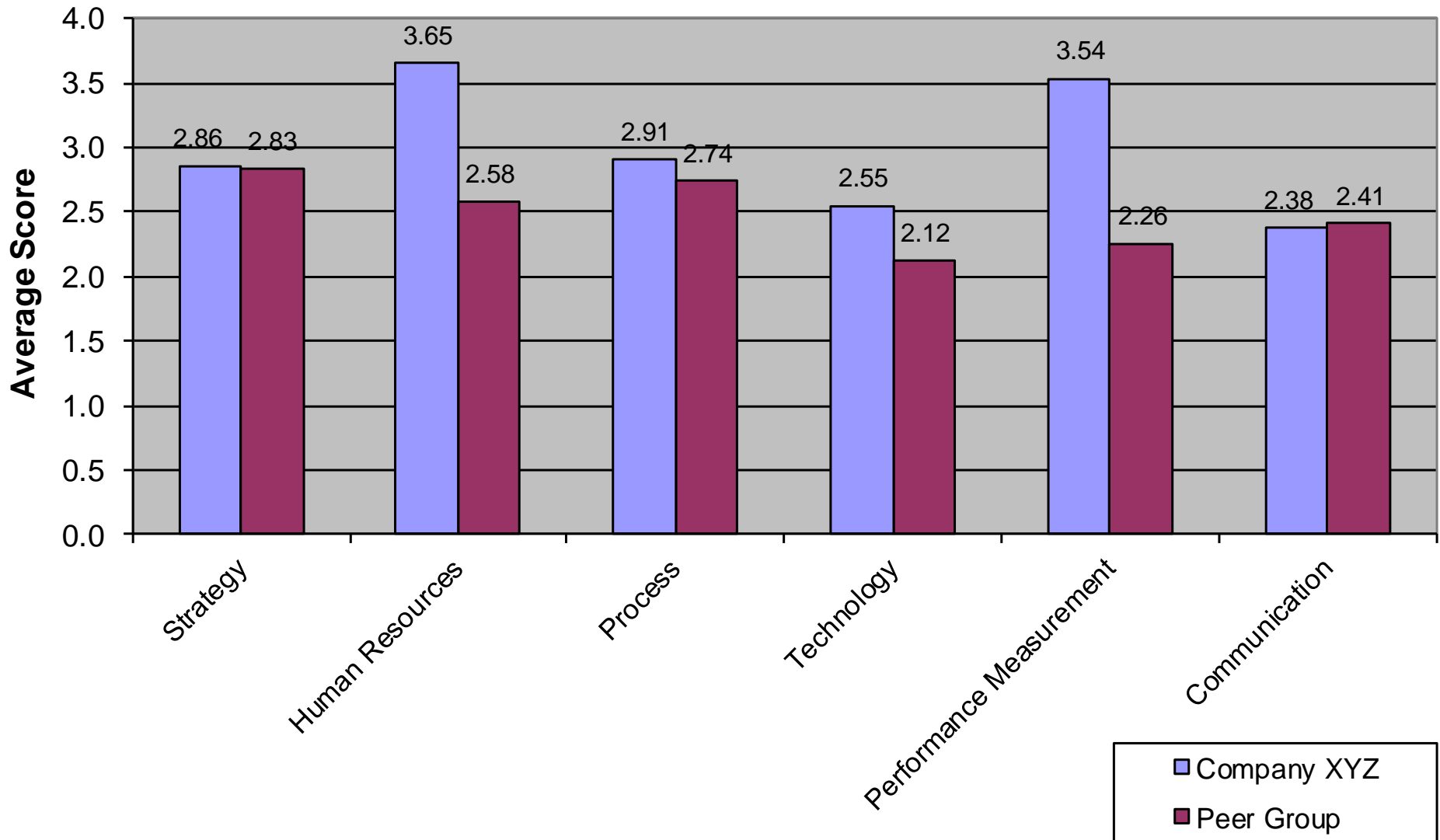| Ranking	Explanation
1	No Knowledge of the Best Practice.
2	Aware of the Best Practice, but not applying it.
3	Aware of the Best Practice, and applying at a rudimentary level.
4	Best Practice is being effectively applied.
5	Best Practice is being applied in a world-class fashion.

Company XYZ Self Assessment

Best Practice	Strategy Best Practices Defined	Company XYZ's Score	Peer Group Average
1	The Service Desk has a well-defined mission, vision, and strategy. The vision and strategy are well-documented, and communicated to key stakeholders in the organization.	2.0	3.27
2	The Service Desk has a published Service Catalog, including a Supported Products List, that is distributed and communicated to key stakeholders including end users. The Service Catalog is available on-line.	2.0	2.40
3	The Service Desk has an action plan for continuous improvement. The plan is documented and distributed to key stakeholders in the organization, and specific individuals are held accountable for implementing the action plan.	2.0	2.79
4	The Service Desk is well integrated into the information technology function. The service desk acts as the "voice of the user" in IT, and is involved in major IT decisions and deliberations that affect end users. The Service Desk is alerted ahead of time so that they can prepare for major rollouts, or other changes in the IT environment.	2.5	3.02
5	The Service Desk has SLA's that define the level of service to be delivered to users. The SLA's are documented, published, and communicated to key stakeholders in the organization.	4.0	3.43
6	The Service Desk has OLA's (Operating Level Agreements) with other support groups in the organization (e.g., level 2 support, desktop support, field support, etc.). The OLA's clearly define the roles and responsibilities of each support group, and the different support groups abide by the terms of the OLA's.	3.5	1.88
7	The Service Desk actively seeks to improve Level 1 Resolution Rates, First Contact Resolution Rates, Level 0 Resolution Rates (User Self-Help), and Level -1 (Problem Prevention) Resolution Rates by implementing processes, technologies, and training that facilitate these	4.0	3.05
Summary Statistics	**Total Score**	**20.0**	**19.8**
	Average Score	**2.86**	**2.83**

Best Practices Process Assessment Summary

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Module 5: Strategies for Improved Performance

- ■ **Core Components**

  - ☐ Conclusions and Recommendations

  - ☐ Roadmap for World-Class Performance

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Conclusions and Recommendations

■ Conclusions and Recommendations fall into six categories

1. Strategy

2. Human Resource Management

3. Call Handling Processes and Procedures

4. Technology

5. Performance Measurement and Management

6. Stakeholder Communication

A Summary of the Major KPI Correlations

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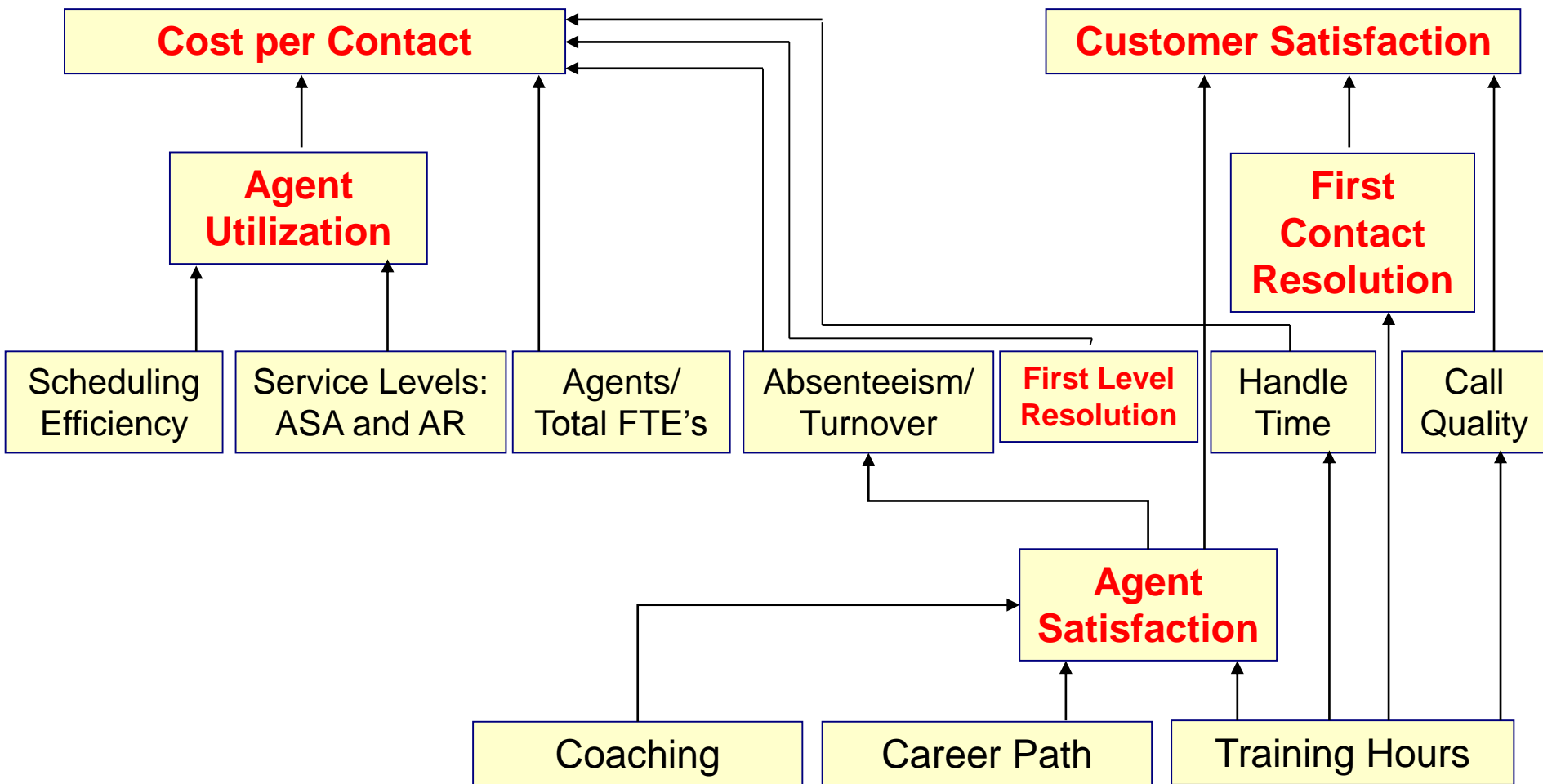
Cost vs. Quality for Global Service Desks

Higher Quality

Middle Quartiles
Effective *but not* Efficient

Top Quartile
Efficient *and* Effective

Quality (Effectiveness)

◆ Your Service Desk
◇ Peer Group

Lower Quality

Lower Quartile

Middle Quartiles
Efficient *but not* Effective

Higher Cost ← → Lower Cost

Cost (Efficiency)
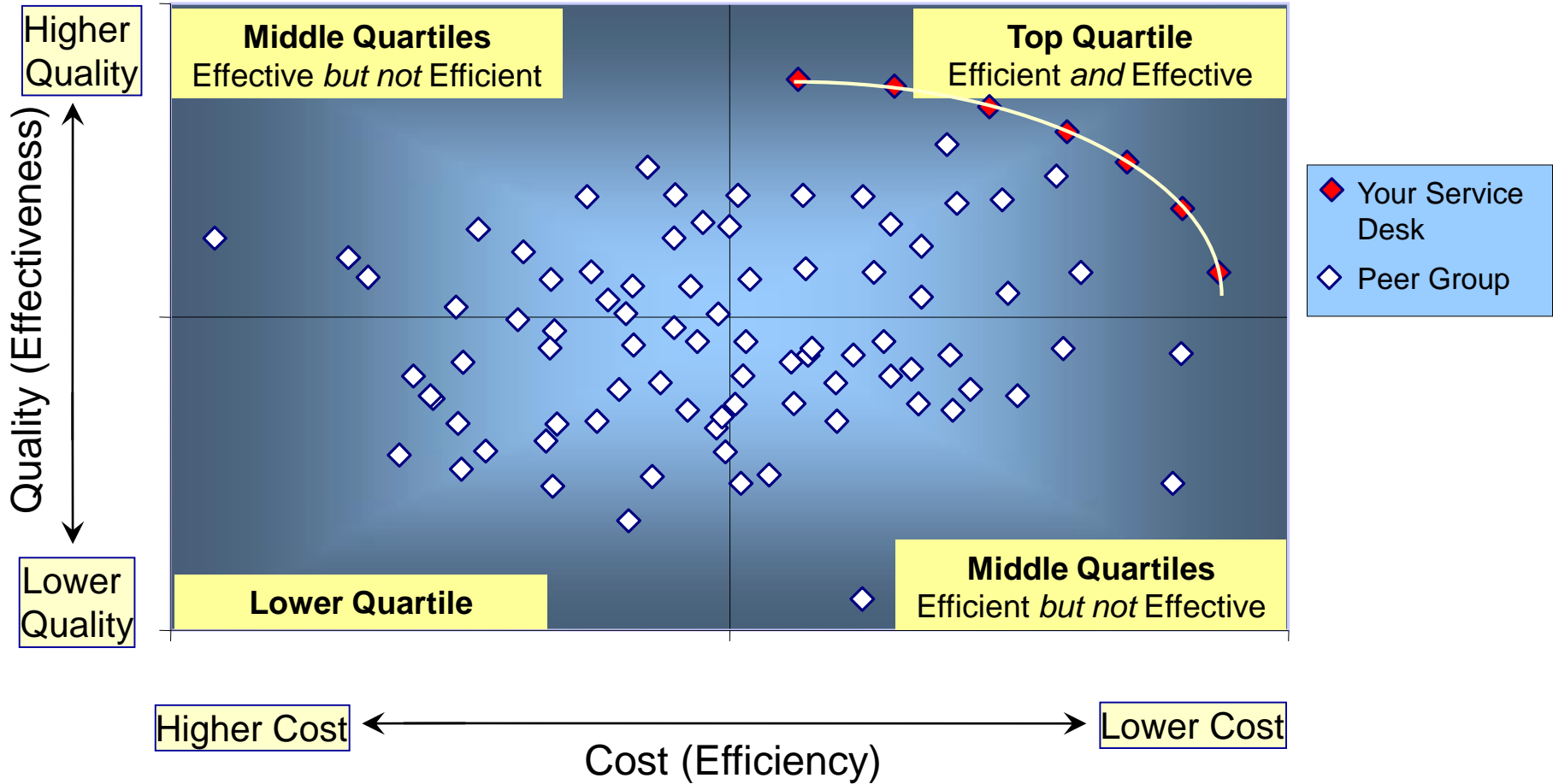
Performance Targets will be Established

Performance Metric	Current Performance	Target Performance
First Contact Resolution Rate	57.6%	**75.0%**
First Level Resolution Rate	N/A	**85.0%**
Average Speed of Answer (ASA) (seconds)	124	**90**
% of Calls Answered in 30 Seconds	2.6%	**40.0%**
Call Abandonment Rate	15.3%	**7.0%**
New Technician Training Hours	100	**140**
Service Desk Balanced Score	**62.1%**	**74.3%**

Achieving the performance targets recommended above will increase the Company XYZ Balanced Score from 62.1% to 74.3%, and put Company XYZ in the top position on the Balanced Scorecard.

Module 6: Report Development and Presentation of Results

- **Core Topics**

  - ☐ Conclusions and Recommendations

  - ☐ Report Development

  - ☐ Presentation of Benchmarking Results

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Write Benchmarking Report

Presentation of Results

The results of the benchmark will be presented in a live webcast

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Summary of Deliverables

Deliverables include…

- Project Participation Kit:
  - ☐ Project Schedule
  - ☐ Data collection questionnaires
- Project Kickoff Meeting
- Telephone Interviews
- Comprehensive Assessment and Benchmarking Report
  - ☐ Project Overview and Objectives
  - ☐ Industry Background
  - ☐ Benchmarking Performance Summary
  - ☐ Balanced Scorecard
  - ☐ Best Practices Process Assessment
  - ☐ Interview Themes and Quotes
  - ☐ Conclusions and Recommendations
  - ☐ Detailed Benchmarking Data
- Live Webcast Presentation of Results via GoTo Meeting

Benchmarking Schedule

Project Component	Service Desk Benchmark Project Tasks	Project Week																			
		1					2					3					4				
		M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F
Service Desk Benchmark	Project Orientation Teleconference	■																			
	Data Collection	■	■	■	■	■	■	■	■	■	■										
	Telephone Interviews											■	■	■							
	Peer Group Selection													■							
	Benchmarking Comparison													■	■						
	Gap Analysis															■					
	Strategies for Improved Performance																■				
	Benchmarking Report Development																	■	■	■	■
	Webcast Presentation of Results																				■

Industry Background

Company XYZ

25 Years of Service Desk Data

More than 2,400 Service Desk Benchmarks

Global Database

30 Key Performance Indicators

Nearly 80 Industry Best Practices

Then and Now: 25 Years of Benchmarking Metrics

Key Performance Indicator	North American Averages	
	1988	2013
Monthly Contacts per End-User	0.79	1.95
Cost per Contact	$9.57	$21.84
Average Handle Time	6:27	12:55
Resolved on First Contact	35%	67%
Resolved at Level 1	39%	85%
Starting Agent Salaries (2013 dollars)	$27,280	$35,411
Service Desk Cost per End-User per Year	$97	$502

So What's Going on Here?

Industry Megatrends: The Drivers
Increasing awareness and understanding of Service Desk TCO (Total Cost of Ownership)
Service Desk evolving from a support to a strategic role in the enterprise
The growing importance of the Service Desk in shaping end-user opinions on IT

And What are the Implications?

Industry Megatrends: The Result
Increased Emphasis on First Contact Resolution (FCR)
Strategic Application of Key Performance Indicators (KPI's)
Investments in Tech Development
New Models for Measuring Service Desk Value
Renewed Emphasis on Internal Marketing
Increased Starting Salaries for Techs

Support Drives Customer Satisfaction for *All* of IT
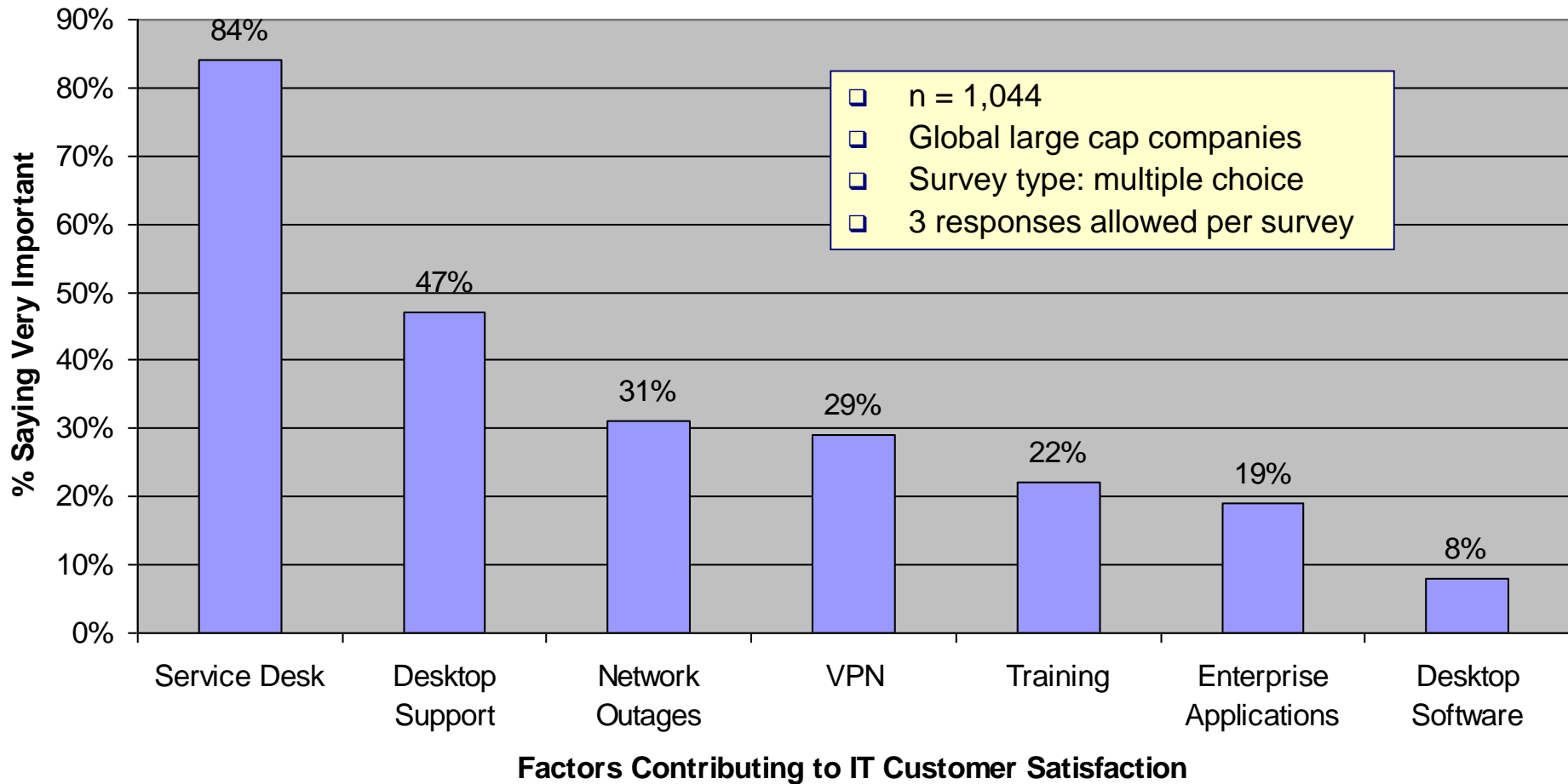
Chart: % Saying Very Important (Y-axis) vs. Factors Contributing to IT Customer Satisfaction (X-axis)

- Service Desk: 84%
- Desktop Support: 47%
- Network Outages: 31%
- VPN: 29%
- Training: 22%
- Enterprise Applications: 19%
- Desktop Software: 8%

Callout box:
- ❑ n = 1,044
- ❑ Global large cap companies
- ❑ Survey type: multiple choice
- ❑ 3 responses allowed per survey

❑ 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

Building a Service-Based Competitive Advantage!

A Fundamental Shift

OLD PARADIGM

- Service Desk is a support function
- Customer contact is a necessary evil
- Play catch up with customer needs and expectations – reactive!
- Goal is customer satisfaction

NEW PARADIGM

- Service Desk is a source of value creation
- Customer contact is an IT differentiator
- Stay ahead of customer needs and expectations – proactive!
- Goal is customer *enthusiasm*

The Service Desk Evolution

Support Stage

- Newer Service Desks and less evolved Service Desks are in this category
- Service Desks in this stage are unable to anticipate or prepare for problems
- A <u>reactive</u> "fire-fighting" mentality prevails at this stage
- Call volume continually increases at this stage
- Customer *satisfaction* is the goal

Growth Stage

- Heavy investments in training and technology characterize this stage
- An expert network of problem solvers is established outside the Service Desk
- Automation begins
  - ACD, VRU, report generation, etc.
- Knowledge base established
- Call volume oftentimes levels off

Strategic Stage

- The primary goal of a strategic Service Desk is to <u>make end users more productive</u>
- Service Desk anticipates problems and takes action to prevent occurrence
- A <u>proactive</u> mentality prevails
- Users are given tools to solve their own problems
- Call volume sometimes declines at this stage
- Problem complexity increases
- <u>Customer *enthusiasm* and *value creation* is the goal!</u>

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How Far Has Your Service Desk Evolved?

61%

31%

8%

Support Stage

Transitional Stage

Strategic Stage

Traditional customer support paradigm

The Service Desk makes a shift from following the customer to leading the customer

The Service Desk operates in a non-traditional customer support paradigm – every transaction adds value!

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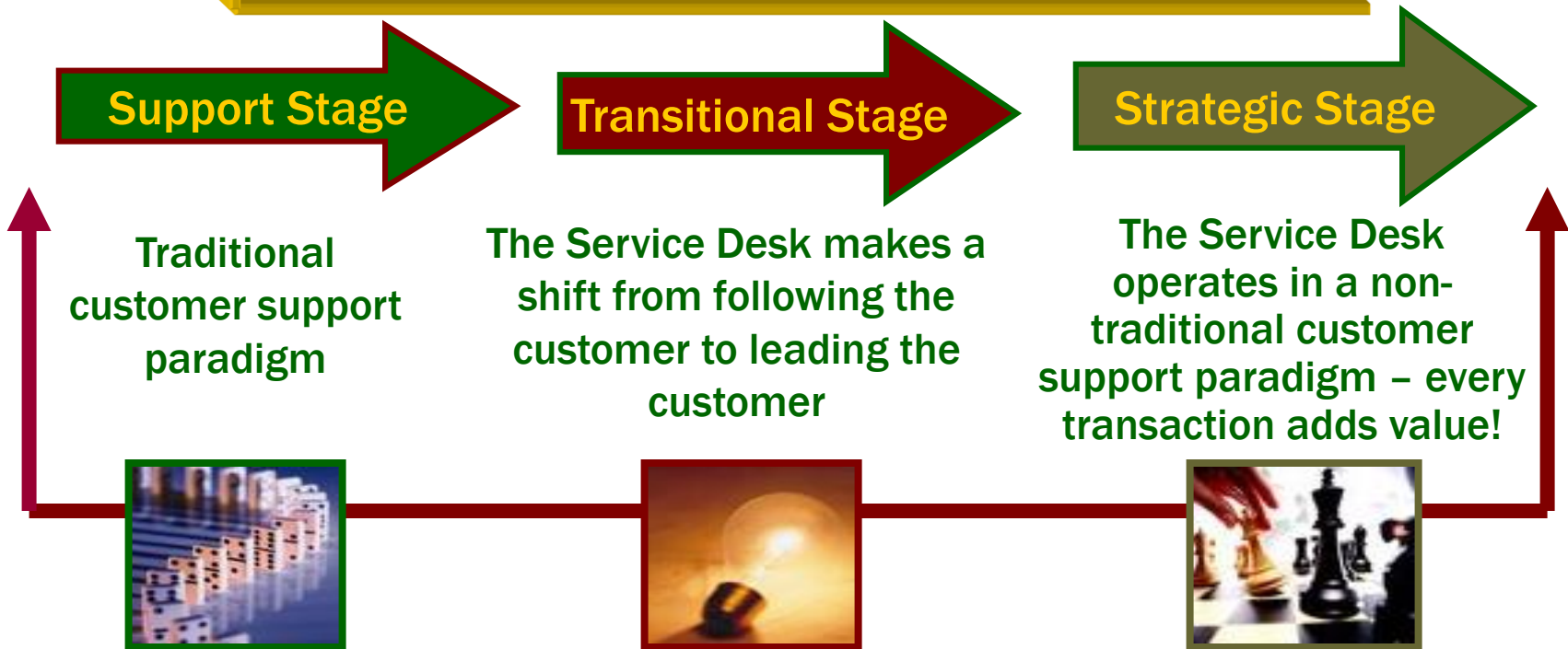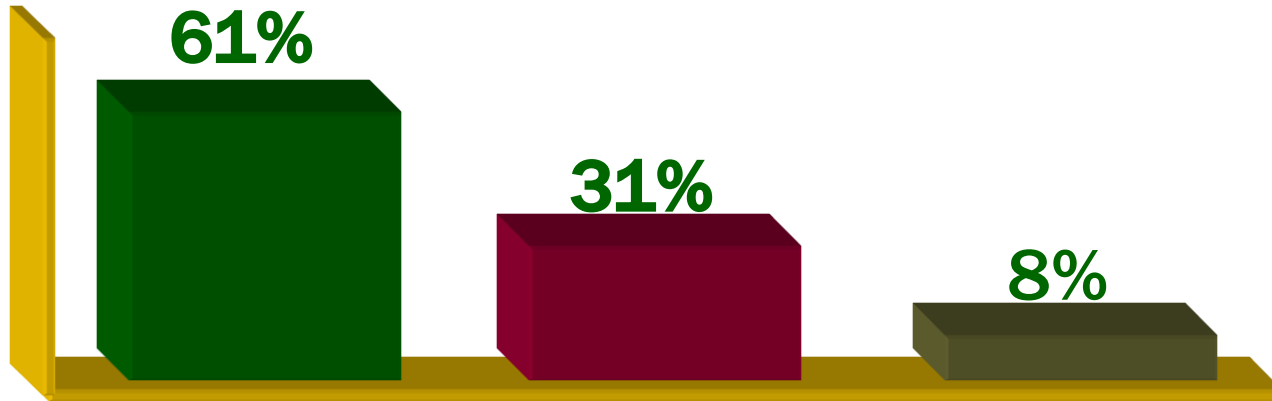
Characteristics of a World-Class Service Desk

- Service Desk consistently exceeds customer expectations
  - ☐ Result is high levels of customer satisfaction
  - ☐ Call quality is consistently high

- Costs are managed at or below industry average levels
  - ☐ Cost per contact below average
  - ☐ Minimizes Total Cost of Ownership (TCO)

- Service Desk follows industry best practices
  - ☐ Industry best practices are defined and documented
  - ☐ Service Desk follows industry best practices

- Every transaction adds value
  - ☐ A positive customer experience
  - ☐ Drives a positive view of IT overall

The World-Class Service Desk Defined
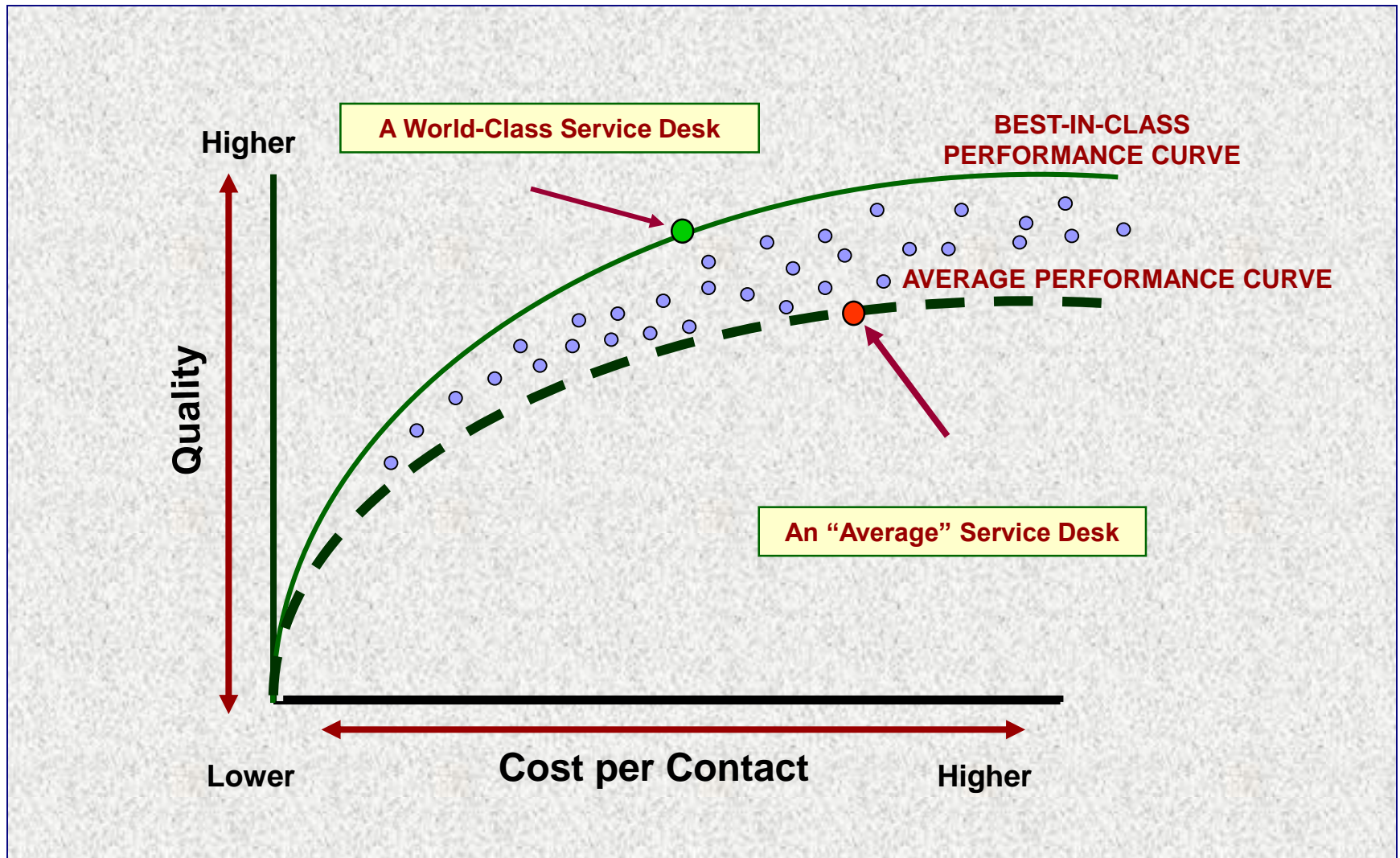
Performance Benchmarking Summary

Company XYZ

Company XYZ Service Desk Overview

Service Desk Location		Oak Brook, IL	
Hours of Operation		24 Hours x 7 Days	
Annual Operating Expense	Company XYZ	$1,729,380	
	PC Helps	$245,140	
	Total	**$1,974,520**	
Monthly Inbound Contact Volume	Company XYZ	17,114	
	PC Helps	1,400	
	Total	**18,514**	
Monthly Outbound Contact Volume		747	
FTE Headcount		Technology Profile	
Tech Level 1	18.8	Trouble Ticket System	BMC Service Desk Express
Supervisor/Team Lead	2.0	Customer Information System (if different from Trouble Ticket System)	SUN LDAP
Manager	1.0	Automatic Call Distributor (ACD)	Alcatel CC Supervision
Training	1.0	Workforce Management / Scheduling System/Software	Agent Powers-2000 2008-2
Senior Analyst	1.0	Interactive Voice Response (IVR)	Alcatel
Total	**23.8**	Labor Reporting Systems	API Company XYZWorks (internal branding)
		Proactive, Diagnostic or Automated Update Solutions	LANDesk 9
		Remote Control Software	LANDesk 9
		Other Self help/Self healing software	RightStar Custom Solution
		Call Quality	NICE Systems 8.90.04.03
		Others	Vericom Soundcare

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Summary of Included Benchmarking Metrics

Cost

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

Quality

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

Productivity

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

Tech

- ❑ Annual Technician Turnover
- ❑ Daily Technician Absenteeism
- ❑ Schedule Adherence
- ❑ New Technician Training Hours
- ❑ Annual Technician Training Hours
- ❑ Technician Tenure
- ❑ Technician Job Satisfaction

Service Level

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

Call Handling

- ❑ Inbound Contact Handle Time
- ❑ User Self-Service Completion Rate

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Benchmarking KPI Performance Summary

Metric Type	Key Performance Indicator (KPI)	Company XYZ	Peer Group Statistics			
			Average	Min	Median	Max
Cost	Cost per Inbound Contact	$8.42	$11.93	$7.09	$11.40	$20.50
	Cost per Minute of Inbound Handle Time	$1.46	$1.64	$1.03	$1.54	$2.43
	Price per Inbound Contact (PC Helps)	$14.59	$15.84	$7.54	$14.62	$24.28
	Price per Minute of Handle Time (PC Helps)	$1.87	$2.07	$1.25	$2.02	$3.51
	First Level Resolution Rate	N/A	82.3%	73.7%	82.9%	97.5%
Productivity	Inbound Contacts per Technician per Month	910	591	329	574	910
	Technician Utilization	54.9%	48.1%	30.8%	50.3%	62.7%
	Technicians as a % of Total Headcount	79.0%	84.5%	75.2%	83.5%	93.7%
Service Level	Average Speed of Answer (ASA) (seconds)	124	71	20	71	129
	% of Calls Answered in 30 Seconds	2.6%	43.9%	2.6%	44.4%	85.8%
	Call Abandonment Rate	15.3%	6.4%	1.1%	5.9%	15.3%
Quality	Call Quality	N/A	83.7%	65.1%	83.9%	94.5%
	First Contact Resolution Rate	57.6%	71.6%	57.6%	70.4%	91.4%
	Customer Satisfaction	87.6%	78.2%	63.1%	76.1%	96.7%
Technician	Annual Technician Turnover	31.3%	40.7%	13.6%	40.3%	65.6%
	Daily Technician Absenteeism	10.3%	10.8%	4.7%	10.1%	24.2%
	Schedule Adherence	89.7%	83.4%	72.7%	83.8%	90.8%
	New Technician Training Hours	100	128	67	125	238
	Annual Technician Training Hours	24	16	0	12	74
	Technician Tenure (months)	25.0	33.2	17.6	28.2	86.9
	Technician Job Satisfaction	99.0%	70.3%	53.3%	66.8%	99.0%
Contact Handling	Inbound Contact Handle Time (minutes)	5.75	7.18	5.29	7.35	9.08
	User Self-Serve Completion Rate	0.0%	9.2%	0.0%	7.9%	25.2%

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KPI Gap Summary

Metric Type	Key Performance Indicator (KPI)	Company XYZ	Peer Average	Performance Gap
Cost	Cost per Inbound Contact	$8.42	$11.93	29.4%
	Cost per Minute of Inbound Handle Time	$1.46	$1.64	10.7%
	Price per Inbound Contact (PC Helps)	$14.59	$15.84	7.9%
	Price per Minute of Handle Time (PC Helps)	$1.87	$2.07	9.7%
	First Level Resolution Rate	N/A	82.3%	N/A
Productivity	Inbound Contacts per Technician per Month	910	591	54.0%
	Technician Utilization	54.9%	48.1%	14.2%
	Technicians as a % of Total Headcount	79.0%	84.5%	-6.5%
Service Level	Average Speed of Answer (ASA) (seconds)	124	71	-75.1%
	% of Calls Answered in 30 Seconds	2.6%	43.9%	-94.1%
	Call Abandonment Rate	15.3%	6.4%	-140.2%
Quality	Call Quality	N/A	83.7%	N/A
	First Contact Resolution Rate	57.6%	71.6%	-19.5%
	Customer Satisfaction	87.6%	78.2%	12.0%
Technician	Annual Technician Turnover	31.3%	40.7%	23.3%
	Daily Technician Absenteeism	10.3%	10.8%	5.0%
	Schedule Adherence	89.7%	83.4%	7.5%
	New Technician Training Hours	100	128	-21.9%
	Annual Technician Training Hours	24	16	46.4%
	Technician Tenure (months)	25.0	33.2	-24.7%
	Technician Job Satisfaction	99.0%	70.3%	40.8%
Contact Handling	Inbound Contact Handle Time (minutes)	5.75	7.18	19.9%
	User Self-Serve Completion Rate	0.0%	9.2%	-100.0%

KPI Gap Ranking

Key Performance Indicator (KPI)	Company XYZ	Peer Average	Performance Gap
Inbound Contacts per Technician per Month	910	591	54.0%
Annual Technician Training Hours	24	16	46.4%
Technician Job Satisfaction	99.0%	70.3%	40.8%
Cost per Inbound Contact	$8.42	$11.93	29.4%
Annual Technician Turnover	31.3%	40.7%	23.3%
Inbound Contact Handle Time (minutes)	5.75	7.18	19.9%
Technician Utilization	54.9%	48.1%	14.2%
Customer Satisfaction	87.6%	78.2%	12.0%
Cost per Minute of Inbound Handle Time	$1.46	$1.64	10.7%
Price per Minute of Handle Time (PC Helps)	$1.87	$2.07	9.7%
Price per Inbound Contact (PC Helps)	$14.59	$15.84	7.9%
Schedule Adherence	89.7%	83.4%	7.5%
Daily Technician Absenteeism	10.3%	10.8%	5.0%
First Level Resolution Rate	N/A	82.3%	N/A
Call Quality	N/A	83.7%	N/A
Technicians as a % of Total Headcount	79.0%	84.5%	-6.5%
First Contact Resolution Rate	57.6%	71.6%	-19.5%
New Technician Training Hours	100	128	-21.9%
Technician Tenure (months)	25.0	33.2	-24.7%
Average Speed of Answer (ASA) (seconds)	124	71	-75.1%
% of Calls Answered in 30 Seconds	2.6%	43.9%	-94.1%
User Self-Serve Completion Rate	0.0%	9.2%	-100.0%
Call Abandonment Rate	15.3%	6.4%	-140.2%

M e t r i c N e t

Quartile Rankings: Cost and Productivity Metrics

Cost Metric	Quartile				Your Service Desk Performance
	1 (Top)	2	3	4 (Bottom)	
Cost per Inbound Contact	$7.09 $8.43	$8.43 $11.40	$11.40 $13.84	$13.84 $20.50	$8.42
Cost per Minute of Inbound Handle Time	$1.03 $1.39	$1.39 $1.54	$1.54 $1.87	$1.87 $2.43	$1.46
Price per Inbound Contact (PC Helps)	$7.54 $13.23	$13.23 $14.62	$14.62 $19.16	$19.16 $24.28	$14.59
Price per Minute of Handle Time (PC Helps)	$1.25 $1.69	$1.69 $2.02	$2.02 $2.20	$2.20 $3.51	$1.87
First Level Resolution Rate	97.5% 86.1%	86.1% 82.9%	82.9% 77.2%	77.2% 73.7%	N/A

Productivity Metric	Quartile				Your Service Desk Performance
	1 (Top)	2	3	4 (Bottom)	
Inbound Contacts per Technician per Month	910 665	665 574	574 483	483 329	910
Technician Utilization	62.7% 53.1%	53.1% 50.3%	50.3% 43.8%	43.8% 30.8%	54.9%
Technicians as a % of Total Headcount	93.7% 89.7%	89.7% 83.5%	83.5% 80.1%	80.1% 75.2%	79.0%

M e t r i c N e t

Quartile Rankings: Service Level and Quality Metrics

Service Level Metric	Quartile				Your Service Desk Performance
	1 (Top)	2	3	4 (Bottom)	
Average Speed of Answer (ASA) (seconds)	20 49	49 71	71 90	90 129	124
% of Calls Answered in 30 Seconds	85.8% 58.4%	58.4% 44.4%	44.4% 28.6%	28.6% 2.6%	2.6%
Call Abandonment Rate	1.1% 3.9%	3.9% 5.9%	5.9% 9.0%	9.0% 15.3%	15.3%

Quality Metric	Quartile				Your Service Desk Performance
	1 (Top)	2	3	4 (Bottom)	
Call Quality	94.5% 90.1%	90.1% 83.9%	83.9% 83.9%	83.9% 65.1%	N/A
First Contact Resolution Rate	91.4% 73.2%	73.2% 70.4%	70.4% 68.0%	68.0% 57.6%	57.6%
Customer Satisfaction	96.7% 83.4%	83.4% 76.1%	76.1% 74.4%	74.4% 63.1%	87.6%

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Quartile Rankings: Technician Metrics

Technician Performance Metric	Quartile				Your Service Desk Performance
	1 (Top)	2	3	4 (Bottom)	
Annual Technician Turnover	13.6% — 34.8%	34.8% — 40.3%	40.3% — 48.8%	48.8% — 65.6%	31.3%
Daily Technician Absenteeism	4.7% — 6.8%	6.8% — 10.1%	10.1% — 12.7%	12.7% — 24.2%	10.3%
Schedule Adherence	90.8% — 85.7%	85.7% — 83.8%	83.8% — 80.2%	80.2% — 72.7%	89.7%
New Technician Training Hours	238 — 153	153 — 125	125 — 100	100 — 67	100
Annual Technician Training Hours	74 — 24	24 — 12	12 — 0	0 — 0	24
Technician Tenure (months)	86.9 — 36.7	36.7 — 28.2	28.2 — 23.6	23.6 — 17.6	25.0
Technician Job Satisfaction	99.0% — 76.5%	76.5% — 66.8%	66.8% — 64.3%	64.3% — 53.3%	99.0%

Quartile Rankings: Contact Handling Metrics

Contact Handling Metric	Quartile				Your Service Desk Performance
	1 (Top)	2	3	4 (Bottom)	
Inbound Contact Handle Time (minutes)	5.29 – 6.60	6.60 – 7.35	7.35 – 7.77	7.77 – 9.08	5.75
User Self-Serve Completion Rate	25.2% – 14.1%	14.1% – 7.9%	7.9% – 1.8%	1.8% – 0.0%	0.0%

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The Service Desk Scorecard: An Overview

- The Service Desk scorecard employs a methodology that provides you with a single, all-inclusive measure of your Service Desk performance

- It combines cost, service level, productivity, and quality metrics into an overall performance indicator for your Service Desk

- Your Service Desk score will range between 0 and 100%, and can be compared directly to the scores of other Service Desks in the benchmark

- By computing your overall score on a monthly or quarterly basis, you can track and trend your performance over time

- Charting and tracking your Service Desk score is an ideal way to ensure continuous improvement in your Service Desk!

The Company XYZ Service Desk Scorecard

Performance Metric	Metric Weighting	Performance Range		Your Performance	Metric Score	Balanced Score
		Worst Case	Best Case			
Cost per Inbound Contact	25.0%	$20.50	$7.09	$8.42	90.1%	22.5%
Customer Satisfaction	25.0%	63.1%	96.7%	87.6%	72.9%	18.2%
Technician Utilization	15.0%	30.8%	62.7%	54.9%	75.5%	11.3%
First Contact Resolution Rate	15.0%	57.6%	91.4%	57.6%	0.0%	0.0%
Technician Job Satisfaction	10.0%	53.3%	99.0%	99.0%	100.0%	10.0%
% of Calls Answered in 30 Seconds	10.0%	2.6%	85.8%	2.6%	0.0%	0.0%
Total	100.0%	N/A	N/A	N/A	N/A	62.1%

Step 1

Six critical performance metrics have been selected for the scorecard

Step 2

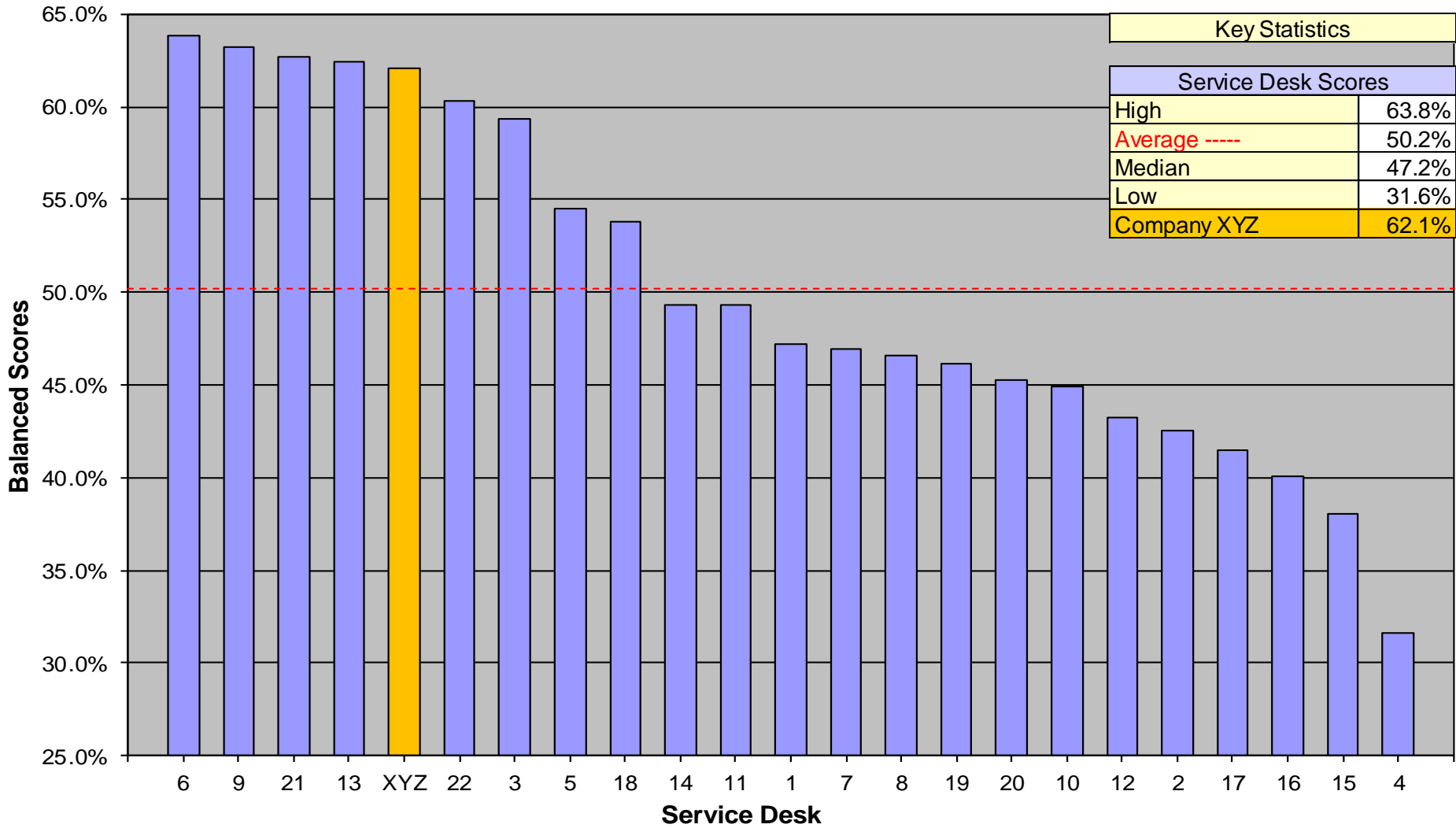Each metric has been weighted according to its relative importance

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: (worst case – actual performance) / (worst case – best case) X 100

Step 6

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

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Balanced Scorecard Summary*

Key Statistics	
Service Desk Scores	
High	63.8%
Average -----	50.2%
Median	47.2%
Low	31.6%
Company XYZ	62.1%

*The scores shown in the chart are based upon the performance metrics, weightings, and data ranges shown on the previous page.

Peer Group Scorecard Summary Data

■ The next two pages illustrate the benchmarking peer group performance for each KPI in the scorecard

■ Page 64 ranks each service desk from best performer (service desk #6) to worst performer (service desk #4) based upon their balanced scores

■ Page 65 ranks each KPI in the scorecard from best (top row) to worst (bottom row)

Scorecard Performance Rankings

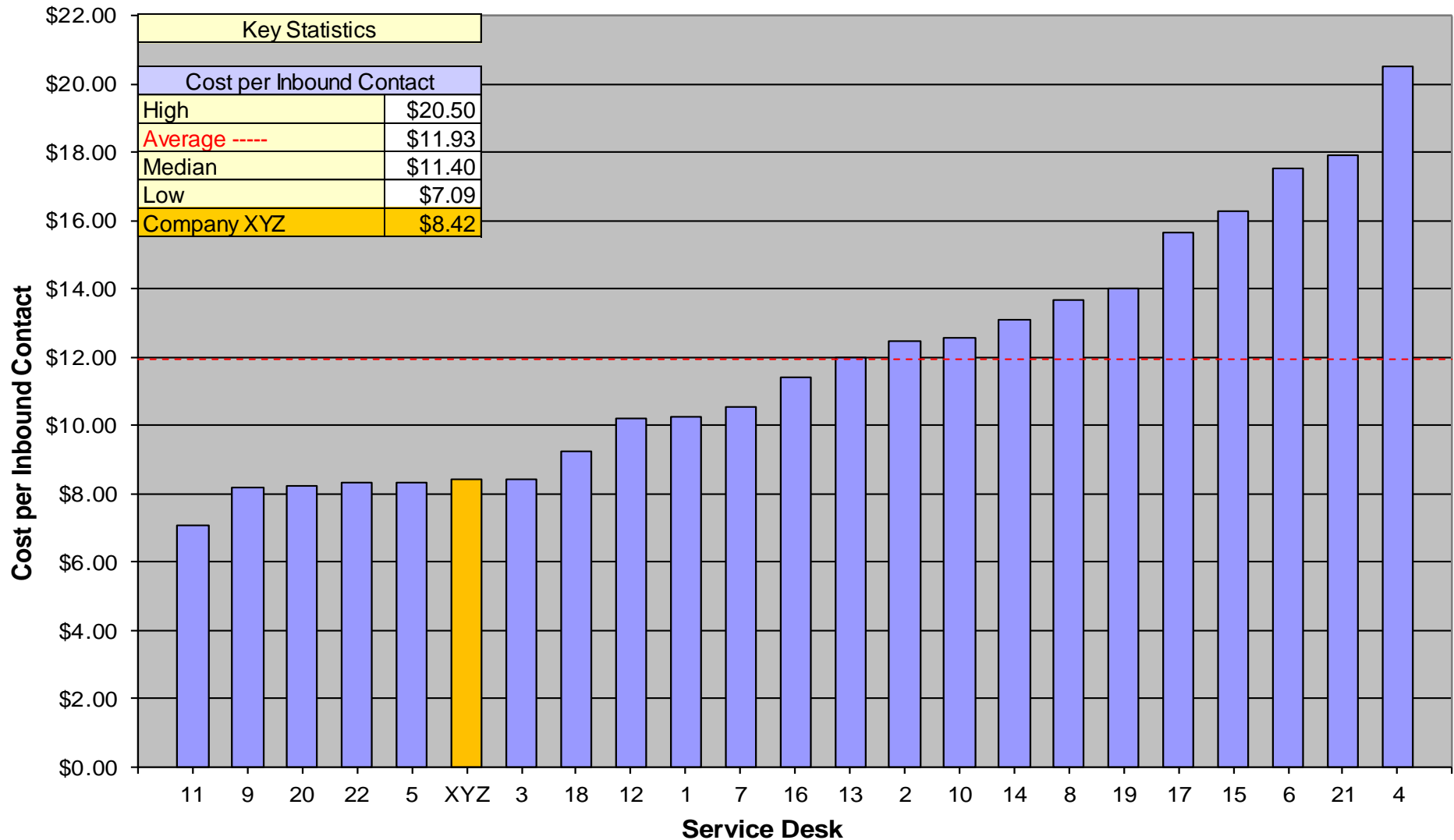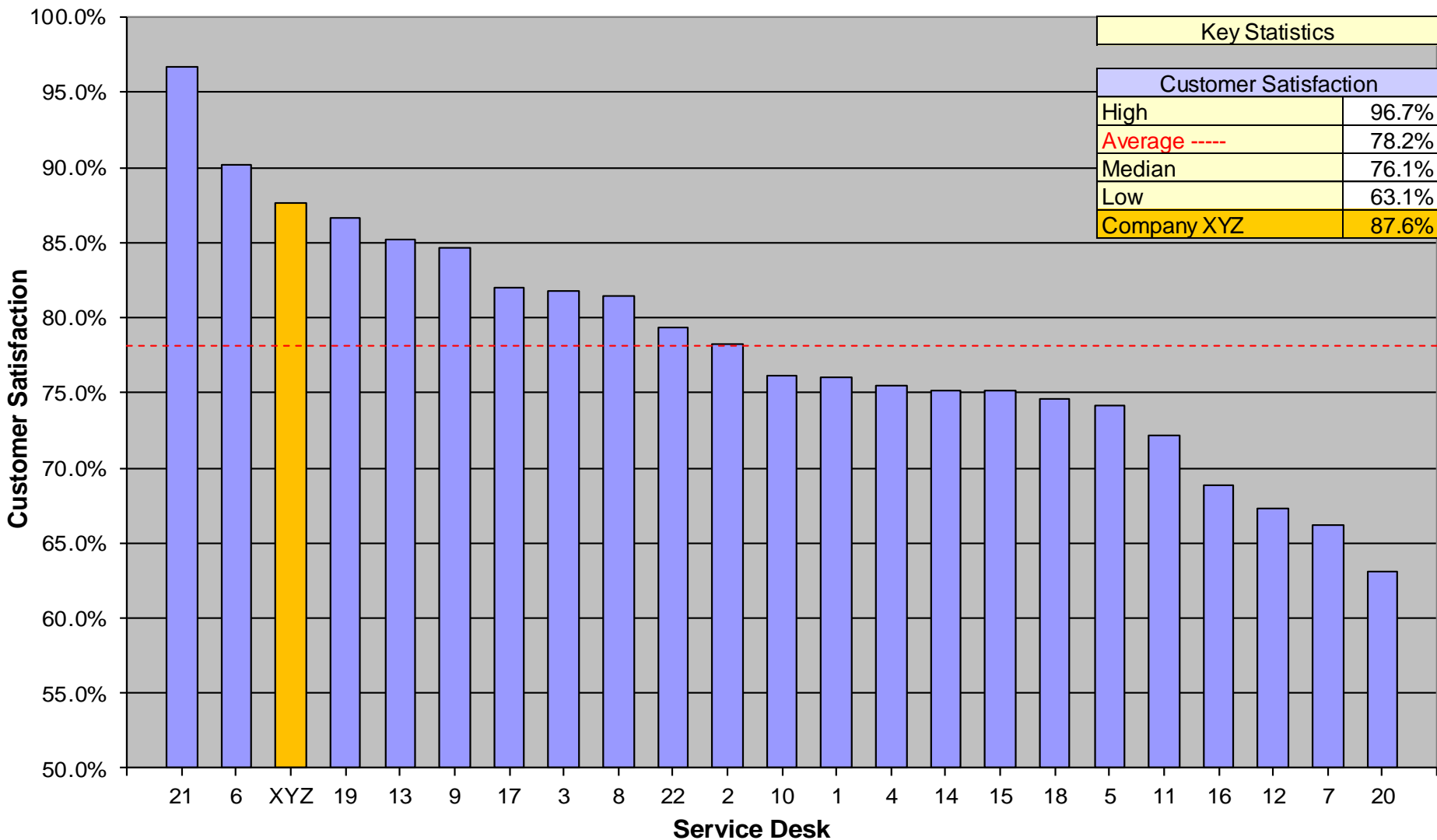|					**Scorecard Metrics**			
Overall Ranking	**Service Desk Number**	**Cost per Inbound Contact**	**Customer Satisfaction**	**Technician Utilization**	**First Contact Resolution Rate**	**Technician Job Satisfaction**	**% of Calls Answered in 30 Seconds**	**Total Balanced Score**
1	6	$17.55	90.2%	50.8%	91.4%	88.3%	53.1%	63.8%
2	9	$8.18	84.7%	52.4%	68.5%	74.7%	40.3%	63.2%
3	21	$17.93	96.7%	35.2%	90.0%	89.8%	73.0%	62.7%
4	13	$12.00	85.2%	48.5%	78.8%	78.5%	60.2%	62.5%
5	Company XYZ	$8.42	87.6%	54.9%	57.6%	99.0%	2.6%	62.1%
6	22	$8.32	79.4%	55.5%	73.1%	71.8%	27.4%	60.4%
7	3	$8.44	81.8%	56.9%	71.1%	66.8%	17.1%	59.4%
8	5	$8.34	74.2%	47.9%	70.4%	65.6%	62.1%	54.5%
9	18	$9.24	74.6%	53.3%	71.1%	65.3%	44.4%	53.8%
10	14	$13.09	75.2%	52.6%	72.3%	72.3%	49.1%	49.3%
11	11	$7.09	72.2%	57.8%	64.8%	53.3%	16.4%	49.3%
12	1	$10.26	76.0%	47.8%	67.5%	66.2%	29.8%	47.2%
13	7	$10.53	66.2%	52.9%	72.9%	66.0%	53.0%	46.9%
14	8	$13.69	81.4%	36.3%	75.1%	66.8%	60.4%	46.6%
15	19	$13.99	86.7%	45.3%	68.7%	55.3%	37.8%	46.1%
16	20	$8.25	63.1%	47.5%	69.1%	61.7%	65.8%	45.2%
17	10	$12.59	76.1%	50.3%	68.1%	72.2%	23.7%	44.9%
18	12	$10.22	67.3%	62.7%	63.5%	57.0%	23.6%	43.2%
19	2	$12.45	78.2%	39.8%	69.1%	63.2%	42.4%	42.5%
20	17	$15.65	82.0%	42.3%	66.7%	68.0%	50.0%	41.5%
21	16	$11.40	68.9%	50.8%	67.8%	57.6%	35.4%	40.1%
22	15	$16.27	75.2%	33.7%	74.9%	79.2%	56.6%	38.1%
23	4	$20.50	75.5%	30.8%	73.2%	78.3%	85.8%	31.6%
Key Statistics	Average	$11.93	78.2%	48.1%	71.6%	70.3%	43.9%	50.2%
	Max	$20.50	96.7%	62.7%	91.4%	99.0%	85.8%	63.8%
	Min	$7.09	63.1%	30.8%	57.6%	53.3%	2.6%	31.6%
	Median	$11.40	76.1%	50.3%	70.4%	66.8%	44.4%	47.2%

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KPI Data in Rank Order

	Cost per Inbound Contact	Customer Satisfaction	Technician Utilization	First Contact Resolution Rate	Technician Job Satisfaction	% of Calls Answered in 30 Seconds	Total Balanced Score
Scorecard Metrics							
Company XYZ	$8.42	87.6%	54.9%	57.6%	99.0%	2.6%	62.1%
Ranking	6	3	5	23	1	23	5
Quartile	1	1	1	4	1	4	1
1	$7.09	96.7%	62.7%	91.4%	99.0%	85.8%	63.8%
2	$8.18	90.2%	57.8%	90.0%	89.8%	73.0%	63.2%
3	$8.25	87.6%	56.9%	78.8%	88.3%	65.8%	62.7%
4	$8.32	86.7%	55.5%	75.1%	79.2%	62.1%	62.5%
5	$8.34	85.2%	54.9%	74.9%	78.5%	60.4%	62.1%
6	$8.42	84.7%	53.3%	73.2%	78.3%	60.2%	60.4%
7	$8.44	82.0%	52.9%	73.1%	74.7%	56.6%	59.4%
8	$9.24	81.8%	52.6%	72.9%	72.3%	53.1%	54.5%
9	$10.22	81.4%	52.4%	72.3%	72.2%	53.0%	53.8%
10	$10.26	79.4%	50.8%	71.1%	71.8%	50.0%	49.3%
11	$10.53	78.2%	50.8%	71.1%	68.0%	49.1%	49.3%
12	$11.40	76.1%	50.3%	70.4%	66.8%	44.4%	47.2%
13	$12.00	76.0%	48.5%	69.1%	66.8%	42.4%	46.9%
14	$12.45	75.5%	47.9%	69.1%	66.2%	40.3%	46.6%
15	$12.59	75.2%	47.8%	68.7%	66.0%	37.8%	46.1%
16	$13.09	75.2%	47.5%	68.5%	65.6%	35.4%	45.2%
17	$13.69	74.6%	45.3%	68.1%	65.3%	29.8%	44.9%
18	$13.99	74.2%	42.3%	67.8%	63.2%	27.4%	43.2%
19	$15.65	72.2%	39.8%	67.5%	61.7%	23.7%	42.5%
20	$16.27	68.9%	36.3%	66.7%	57.6%	23.6%	41.5%
21	$17.55	67.3%	35.2%	64.8%	57.0%	17.1%	40.1%
22	$17.93	66.2%	33.7%	63.5%	55.3%	16.4%	38.1%
23	$20.50	63.1%	30.8%	57.6%	53.3%	2.6%	31.6%
Average	$11.93	78.2%	48.1%	71.6%	70.3%	43.9%	50.2%
Max	$20.50	96.7%	62.7%	91.4%	99.0%	85.8%	63.8%
Min	$7.09	63.1%	30.8%	57.6%	53.3%	2.6%	31.6%
Median	$11.40	76.1%	50.3%	70.4%	66.8%	44.4%	47.2%

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Scorecard Metrics: Cost per Inbound Contact

Key Statistics	
Cost per Inbound Contact	
High	$20.50
Average -----	$11.93
Median	$11.40
Low	$7.09
Company XYZ	$8.42

Cost per Inbound Contact (y-axis)

Service Desk (x-axis): 11, 9, 20, 22, 5, XYZ, 3, 18, 12, 1, 7, 16, 13, 2, 10, 14, 8, 19, 17, 15, 6, 21, 4

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Scorecard Metrics: Customer Satisfaction

Key Statistics	
Customer Satisfaction	
High	96.7%
Average -----	78.2%
Median	76.1%
Low	63.1%
Company XYZ	87.6%

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Scorecard Metrics: Technician Utilization
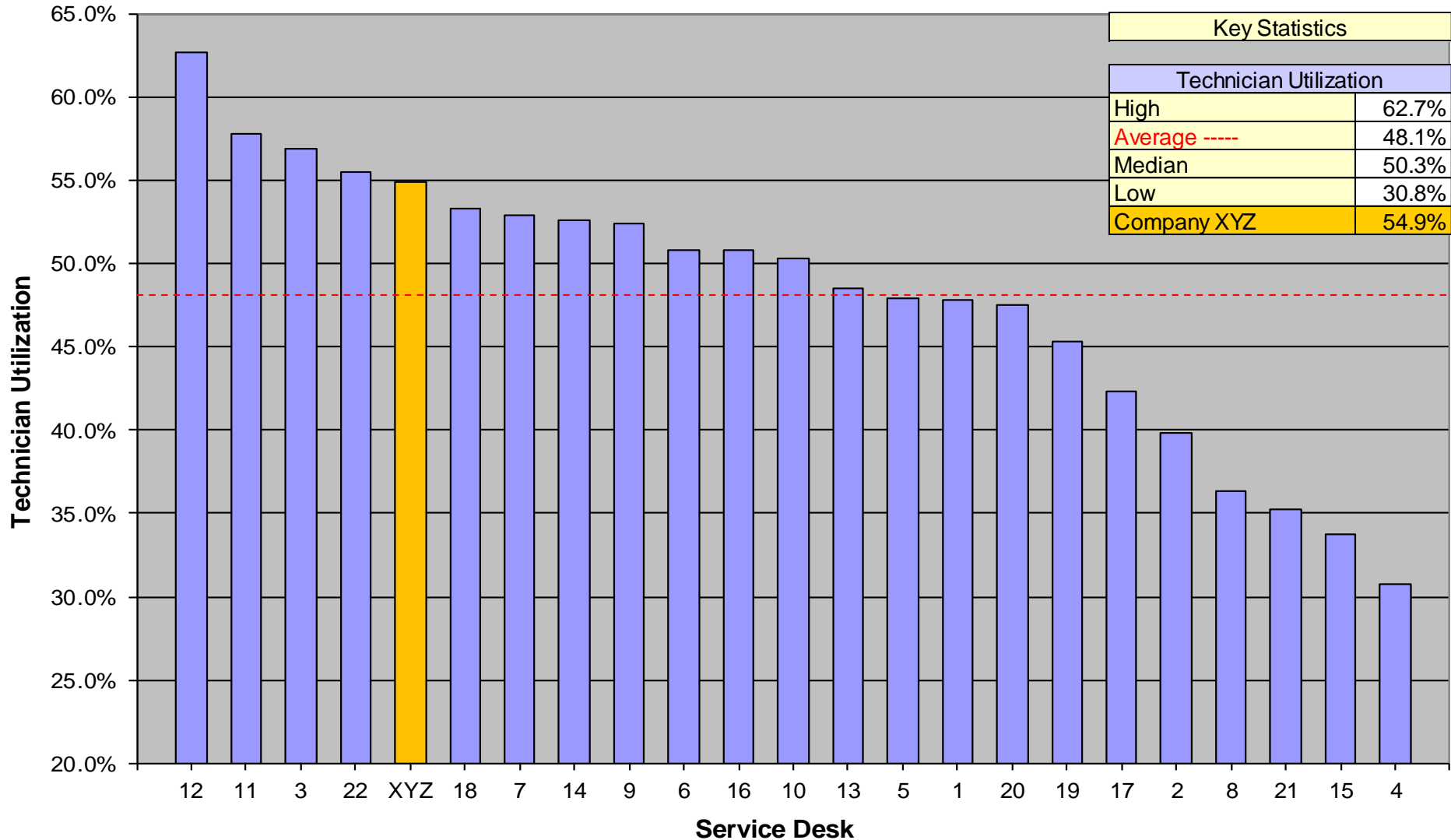
Key Statistics	
Technician Utilization	
High	62.7%
Average -----	48.1%
Median	50.3%
Low	30.8%
Company XYZ	54.9%

Scorecard Metrics: First Contact Resolution Rate
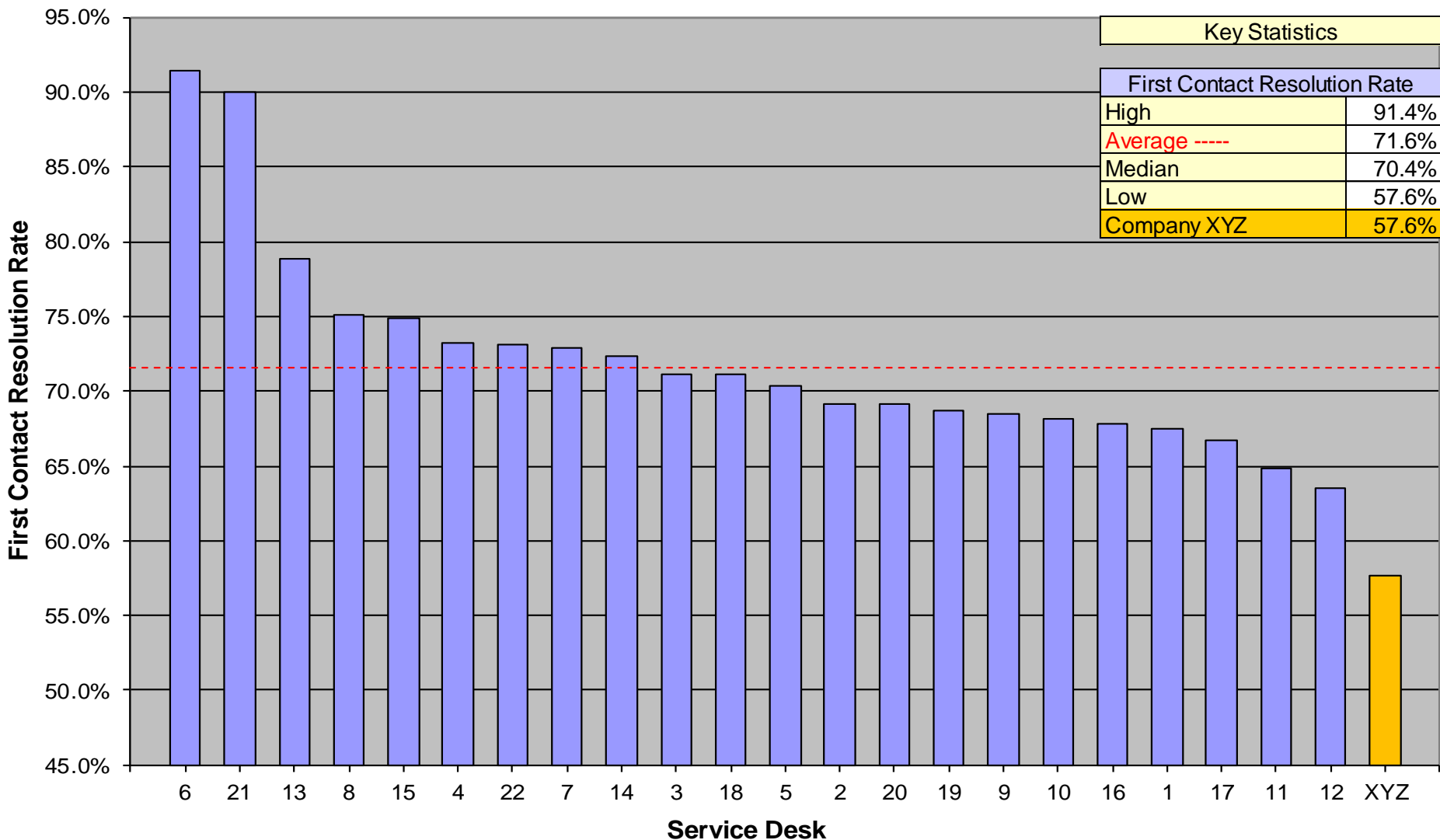
Key Statistics	
First Contact Resolution Rate	
High	91.4%
Average -----	71.6%
Median	70.4%
Low	57.6%
Company XYZ	57.6%

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Scorecard Metrics: Technician Job Satisfaction

Key Statistics	
Technician Job Satisfaction	
High	99.0%
Average -----	70.3%
Median	66.8%
Low	53.3%
Company XYZ	99.0%

Technician Job Satisfaction (y-axis)

Sevice Desk (x-axis): XYZ, 21, 6, 15, 13, 4, 9, 14, 10, 22, 17, 3, 8, 1, 7, 5, 18, 2, 20, 16, 12, 19, 11
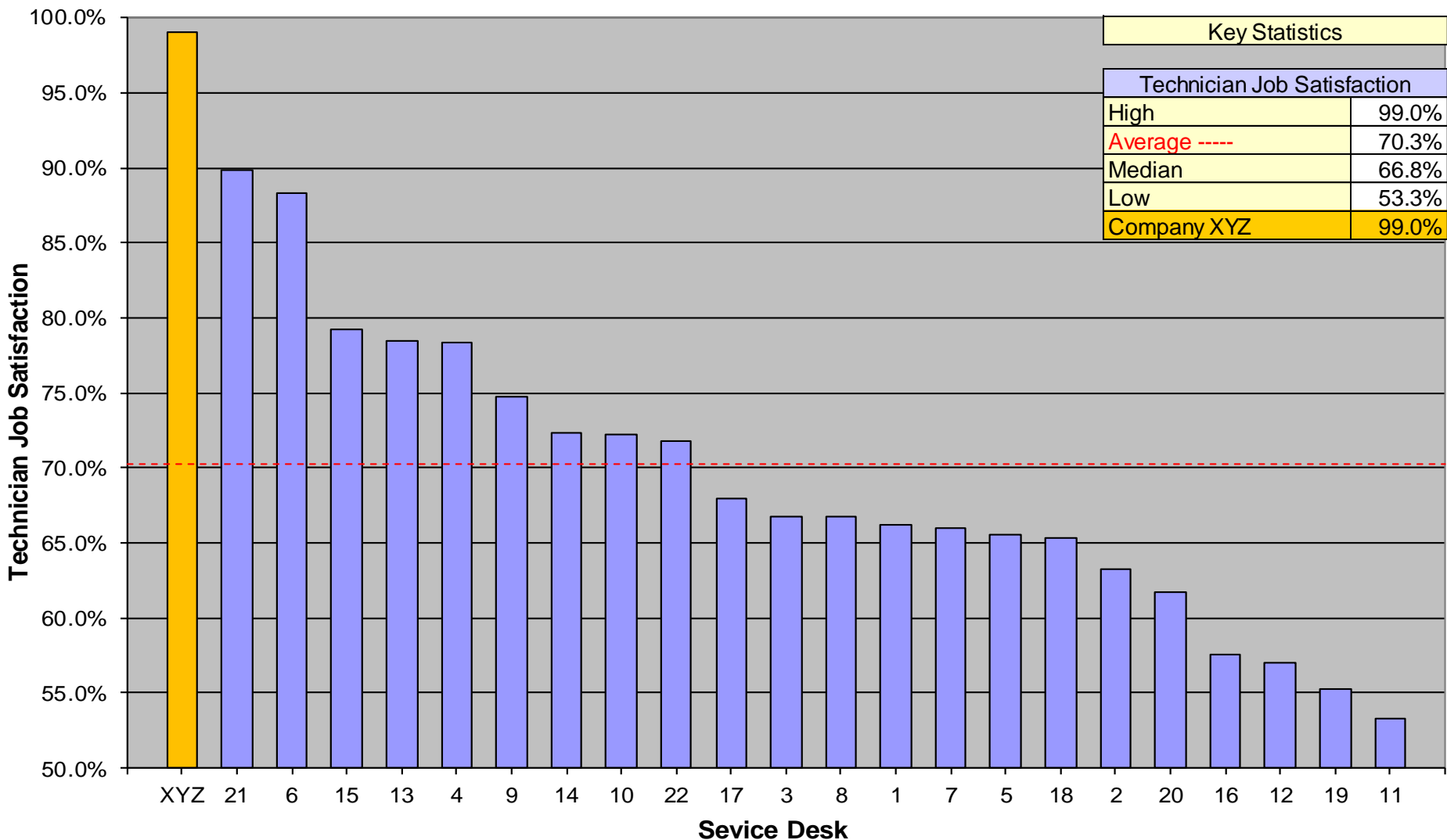
Scorecard Metrics: % of Calls Answered in 30 Seconds

Key Statistics	
% of Calls Answered in 30 Seconds	
High	85.8%
Average -----	43.9%
Median	44.4%
Low	2.6%
Company XYZ	2.6%

% of Calls Answered in 30 Seconds (y-axis)

Service Desk (x-axis): 4, 21, 20, 5, 8, 13, 15, 6, 7, 17, 14, 18, 2, 9, 19, 16, 1, 22, 10, 12, 3, 11, XYZ

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Cost vs. Quality for Company XYZ Service Desk

Middle Quartiles
Effective *but not* Efficient

Top Quartile
Efficient *and* Effective

Lower Quartile

Middle Quartiles
Efficient *but not* Effective

Higher Quality

Lower Quality

Quality (Effectiveness)

◆ Company XYZ Service Desk

◇ Global Database

Higher Cost

Lower Cost

Cost (Efficiency)

Best Practices Process Assessment

Company XYZ

Six-Part Model for Service Desk Best Practices
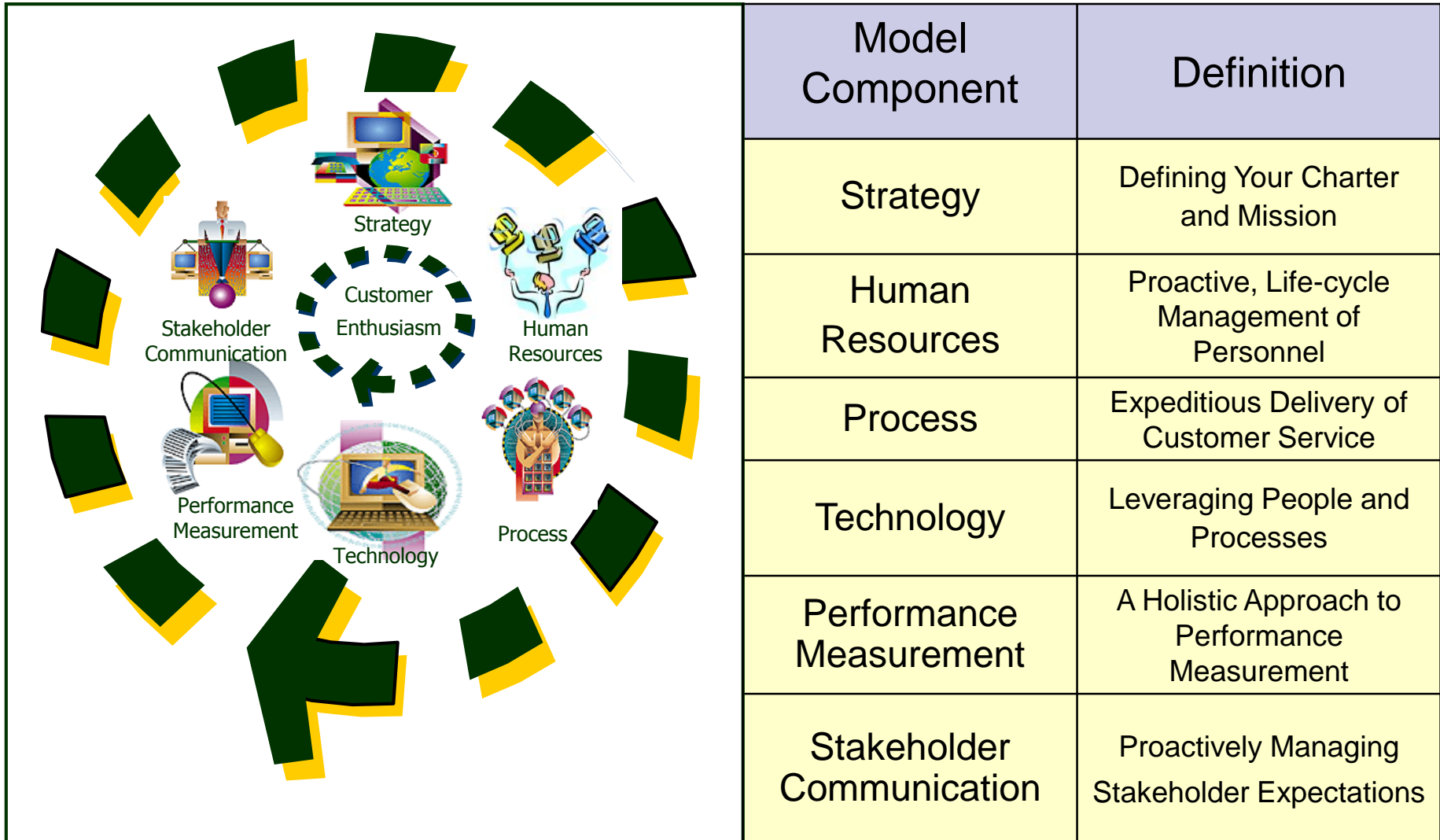
Model Component	Definition
Strategy	Defining Your Charter and Mission
Human Resources	Proactive, Life-cycle Management of Personnel
Process	Expeditious Delivery of Customer Service
Technology	Leveraging People and Processes
Performance Measurement	A Holistic Approach to Performance Measurement
Stakeholder Communication	Proactively Managing Stakeholder Expectations

Best Practices Evaluation Criteria

Ranking	Explanation
1	No Knowledge of the Best Practice.
2	Aware of the Best Practice, but not applying it.
3	Aware of the Best Practice, and applying at a rudimentary level.
4	Best Practice is being effectively applied.
5	Best Practice is being applied in a world-class fashion.

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MetricNet Has Defined 72 Service Desk Best Practices

Strategy

- 7 Best Practices

Human Resources

- 13 Best Practices

Process

- 16 Best Practices

Technology

- 10 Best Practices

Performance Measurement

- 14 Best Practices

Communication

- 12 Best Practices

Total Score from 72 to 360

- The lowest score possible on the Best Practices Process Assessment is 72: Maturity Level 1 X 72 Best Practices = 72

- The highest score possible on the Best Practices Process Assessment is 360: Maturity Level 5 X 72 Best Practices = 360

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Strategy: 7 Best Practices

Best Practice	Strategy Best Practices Defined	Company XYZ's Score	Peer Group Average
1	The Service Desk has a well-defined mission, vision, and strategy. The vision and strategy are well-documented, and communicated to key stakeholders in the organization.	2.0	3.27
2	The Service Desk has a published Service Catalog, including a Supported Products List, that is distributed and communicated to key stakeholders including end users. The Service Catalog is available on-line.	2.0	2.40
3	The Service Desk has an action plan for continuous improvement. The plan is documented and distributed to key stakeholders in the organization, and specific individuals are held accountable for implementing the action plan.	2.0	2.79
4	The Service Desk is well integrated into the information technology function. The service desk acts as the "voice of the user" in IT, and is involved in major IT decisions and deliberations that affect end users. The Service Desk is alerted ahead of time so that they can prepare for major rollouts, or other changes in the IT environment.	2.5	3.02
5	The Service Desk has SLA's that define the level of service to be delivered to users. The SLA's are documented, published, and communicated to key stakeholders in the organization.	4.0	3.43
6	The Service Desk has OLA's (Operating Level Agreements) with other support groups in the organization (e.g., level 2 support, desktop support, field support, etc.). The OLA's clearly define the roles and responsibilities of each support group, and the different support groups abide by the terms of the OLA's.	3.5	1.88
7	The Service Desk actively seeks to improve Level 1 Resolution Rates, First Contact Resolution Rates, Level 0 Resolution Rates (User Self-Help), and Level -1 (Problem Prevention) Resolution Rates by implementing processes, technologies, and training that facilitate these	4.0	3.05
Summary Statistics	**Total Score**	**20.0**	**19.8**
	Average Score	**2.86**	**2.83**

Human Resources: 13 Best Practices

Best Practice	Human Resources Best Practices Defined	Company XYZ's Score	Peer Group Average
1	The Service Desk has a formalized and documented recruiting process for filling vacancies. Job requirements are well defined, and candidates are tested for both technical skills, and customer service soft skills.	4.0	2.74
2	New hires go through a formal training curriculum, including technical and customer service skills, and are required to pass a proficiency exam before independently handling customer contacts.	3.5	3.99
3	Veteran agents (more than 6 months of experience) have access to training opportunities to improve their skill set, job performance, and the overall performance of the service desk. Veteran agents are required to complete a minimum number of refresher training hours each year.	2.0	2.23
4	Agent training classes and curricula are specifically designed to maximize customer satisfaction, the number of user inquiries resolved at Level 1, and the number of inquiries resolved on First Contact.	4.0	1.62
5	Individual agent training plans are clearly defined, documented and regularly updated.	4.0	1.95
6	The service desk has a formalized, documented agent career path. Agents are made aware of their career advancement opportunities, and are encouraged to proactively manage their careers. Agents are coached at least once yearly on their career path and career advancements options.	4.0	2.68
7	Agents have the opportunity to advance their careers in at least two ways: by improving their technical and customer service skills, and by improving their management and supervisory skills.	3.0	2.07
8	Agents are coached by their supervisor in one-on-one sessions on a monthly basis. Recorded calls are reviewed, and the supervisor provides specific suggestions to each agent on how to improve performance.	4.0	2.70
9	Agents have quantifiable performance goals (e.g., for call quality, customer satisfaction, number of calls handled per month, etc.), and are held accountable for achieving their goals on a monthly basis.	4.0	3.24
10	Agents are eligible for incentives and rewards based upon performance. These could include monetary incentives such as annual bonuses, or other incentives such as time off work, gift certificates, etc.	2.0	2.48
11	Agent performance goals are linked to and aligned with the overall Service Desk goals and performance targets.	4.0	1.90
12	Agent Satisfaction surveys are conducted at least once per year, and the results of the survey are used to manage and improve agent morale.	4.0	1.81
13	Formal Performance reviews are scheduled and completed for all personnel at least once annually.	5.0	4.17
	Summary Statistics Total Score	47.5	33.58
	Summary Statistics Average Score	3.65	2.58

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Process: 16 Best Practices

Best Practice	Process Best Practices Defined	Company XYZ's Score	Peer Group Average
1	The Service Desk is designed as a Single Point of Contact (SPOC) for all IT related problems, issues, and service requests.	4.0	3.53
2	Customers are offered a range of access options to the Service Desk, including live voice, voice mail, email, web chat, self-service, fax, and walk-in.	3.0	4.11
3	Contact handling processes are standardized, documented, and available online. With few exceptions, the standards are followed by the service desk agents.	4.0	3.18
4	Escalation points are well defined and documented. These include other support groups (e.g., Level 2 support, Deskside Support, etc.), and individuals to whom calls may be escalated.	4.0	3.77
5	Rules for escalation and call transfer are well defined and documented. Agents know when and where to transfer or route a call if they are unable to assist the user.	3.0	3.60
6	Indirect contact channels, including Email, Voice Mail, and Faxes are treated with the same priority as live phone calls and chat sessions. The work queues from these channels are integrated, or worked in parallel.	2.0	1.82
7	Incoming contacts are assigned a severity code based upon the number of users impacted, and the urgency of the incident.	2.0	3.38
8	System alarms notify the service desk when a service level has been breached, whether at Level 1, or at another support level within the organization.	3.0	2.04
9	The Service Desk has a formal, rapid notification and correction process that is activated when a service level has been breached, whether at Level 1, or at some other support level.	2.0	2.17
10	The Service Desk has contingency plans to handle sudden, unexpected spikes in contact volume. These could include having supervisors and other indirect personnel handle incoming calls during a call spike.	2.5	2.58
11	The Service Desk has contingency plans to handle both short and long term interruptions in service delivery.	3.0	1.95
12	The Service Desk has a well defined service planning and readiness process that works closely with both internal engineering groups and vendors, and continues through product field testing and pre-release. This process enables the Service Desk to train for and prepare for supporting new products and services in the IT environment.	2.0	1.64
13	The Service Desk has a formal Knowledge Management Process that facilitates the acquisition, qualification, review, approval, and distribution of knowledge into a Knowledgebase.	3.0	2.37
14	The Service Desk has a mature workforce scheduling process that achieves high agent utilization, while maintaining reasonable service levels.	3.5	2.80
15	The Service Desk has an effective, ongoing process for projecting future workload and staffing requirements.	3.0	2.08
16	The Service Desk conducts periodic Root Cause Analysis (RCA) on the user contact profile to eliminate problems at their source.	2.5	2.77
Summary Statistics	Total Score	46.5	43.79
	Average Score	2.91	2.74

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Technology: 10 Best Practices

Best Practice	Technology Best Practices Defined	Company XYZ's Score	Peer Group Average
1	The Service Desk has a full-featured incident management system that facilitates effective incident tracking, service level compliance, reporting, and root cause analysis.	4.0	3.26
2	The Service Desk has a comprehensive knowledge management tool that facilitates effective knowledge capture and re-use. Service desk agents are able to quickly find solutions to user problems by searching the knowledge base. Solutions for the vast majority of user problems and questions can be found in the knowledge base.	2.5	1.62
3	The Service Desk knowledgebase is used continuously by all Service Desk agents, and results in higher First Contact and First Level Resolution Rates, and lower contact handle times.	2.5	1.49
4	The Service Desk has an effective tool that allows agents to proxy into a user's computer, take control of the computer, and remotely perform diagnostics and problem solving (e.g., Tivoli, Bomgar, GoTo Assist, etc.). The tool increases both first contact and first level resolution rates, and reduces contact handle times.	4.0	3.05
5	The Service Desk has an Automated Password Reset (APR) capability that dramatically reduces the number of password resets that must be performed manually by the Service Desk agents.	2.0	3.57
6	The Service Desk has an effective, integrated self-service portal that is available to all users. The self-service portal provides information, FAQ's, and solutions to problems that are more complex than simple password resets. The tool includes a direct link to service desk technicians. Users are aware of the self-service portal, and usage rates are continuously increasing.	3.0	1.71
7	The incident management system can track and monitor the skill levels of Service Desk agents based on closed tickets by product and/or service code.	2.5	1.66
8	The Service Desk uses technology alerts/alarms to notify the Service Desk or perform self healing scripts when a customer or system issue is proactively identified.	1.0	1.83
9	The Service Desk has a multi-year plan for an integrated technology strategy.	2.0	1.45
10	The Service Desk utilizes a capital investment justification process based on ROI, and reports on post installation ROI as part of this process.	2.0	1.59
	Summary Statistics Total Score	25.5	21.2
	Summary Statistics Average Score	2.55	2.12

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Performance Measurement: 14 Best Practices

Best Practice	Performance Measurement Best Practices Defined	Company XYZ's Score	Peer Group Average
1	Cost per Contact is measured, recorded, and tracked on an ongoing basis.	3.0	2.61
2	Customer Satisfaction is measured, recorded, and tracked on an ongoing basis.	4.0	3.34
3	First Contact Resolution is measured, recorded, and tracked on an ongoing basis.	4.0	2.98
4	First Level Resolution is measured, recorded, and tracked on an ongoing basis.	4.0	2.15
5	Agent Utilization is measured, recorded, and tracked on an ongoing basis.	3.5	1.99
6	Agent Satisfaction is measured, recorded, and tracked.	4.0	1.76
7	The Service Desk maintains a balanced scorecard that provides a single, all-inclusive measure of service desk performance.	3.0	1.81
8	The Service Desk tracks the number of incidents that are resolved outside of the Level 1 Service desk (e.g., at Level 2, Desktop Support, etc.) that could have been resolved by the service desk at Level 1.	3.0	1.19
9	The Service Desk conducts event driven customer surveys whereby the results of customer satisfaction surveys can be linked back to a specific incident, and to a specific agent handling the contact at the service desk.	4.0	3.08
10	Service Desk measures are used holistically, and diagnostically to identify performance gaps in Service Desk performance, and to prescribe actions that will improve performance.	4.0	2.01
11	The Service Desk conducts benchmarking at least once per year.	3.0	2.50
12	Service Desk KPI's are used to establish "stretch" goals.	4.0	2.78
13	The Service Desk understands key correlations and cause/effect relationships between the various KPI's. This enables the Service Desk to achieve desired performance goals by leveraging and driving the underlying "causal" metrics.	4.0	1.84
14	The Service Desk tracks the Mean Time to Resolve (MTR), and the Percentage of tickets resolved within 24, 48, and 72 hours.	2.0	1.54
	Summary Statistics Total Score	49.5	31.6
	Summary Statistics Average Score	3.54	2.26

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Communication: 12 Best Practices

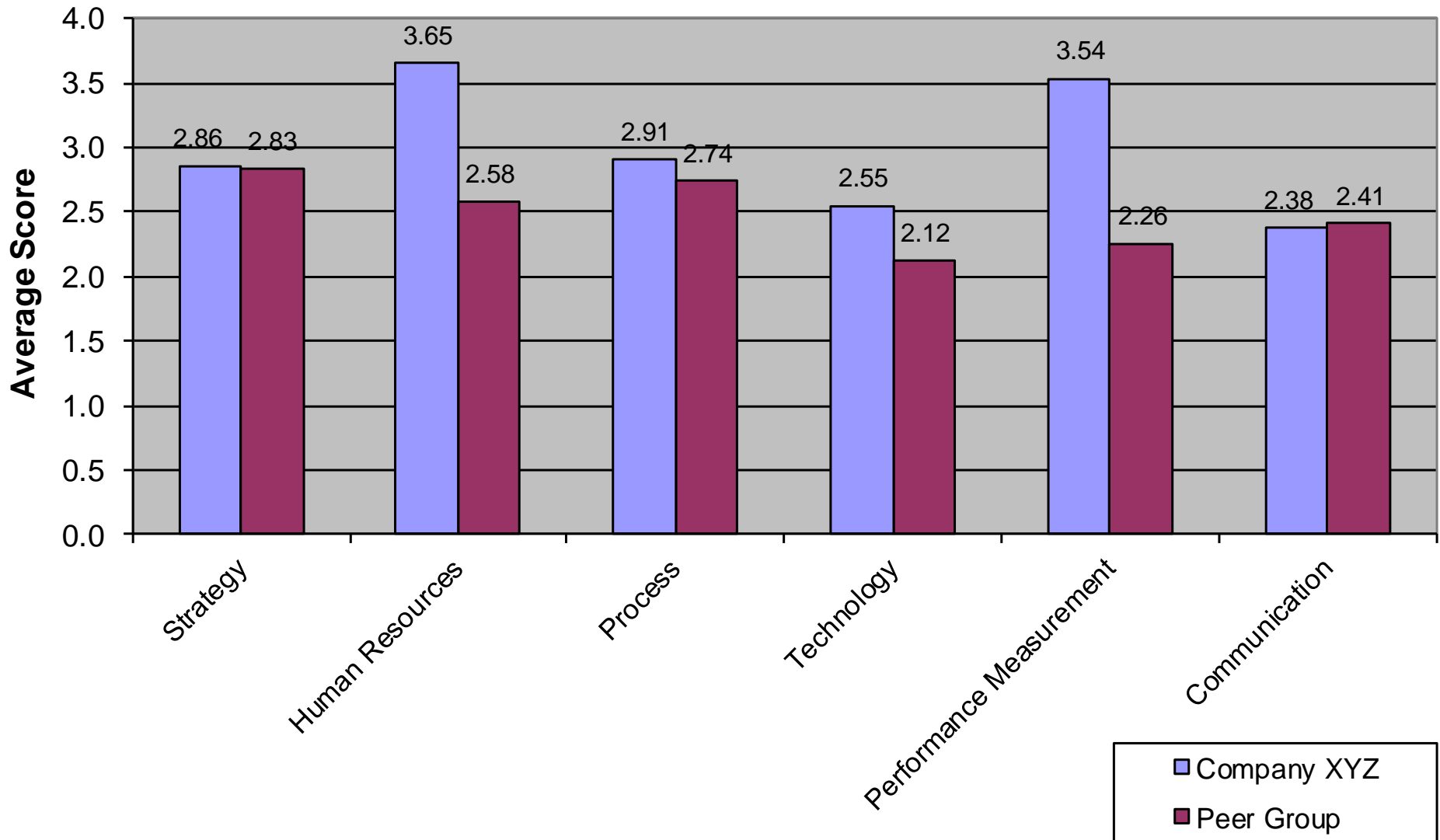| Best Practice	Communication Best Practices Defined	Company XYZ's Score	Peer Group Average
1	The Service Desk maintains active communication with all stakeholder groups, including service desk employees, IT managers, company managers outside of IT, and customers.	3.50	2.63
2	The Service Desk has a formal communications schedule, and provides customized content for each stakeholder group.	3.00	2.37
3	The Service Desk has established User Group Liaisons who represent different groups within the user community. The Service Desk meets periodically with the liaisons to learn about user concerns and questions, and to communicate Service Desk services, plans, and initiatives.	1.00	1.81
4	The Service Desk meets frequently with user groups, and holds "informational briefings" to educate users on supported products and services, hours of operation, training opportunities, tips for getting the most benefit from the service desk, etc.	1.00	2.06
5	The Service Desk meets frequently with other IT managers, and is an integral part of key decisions made within IT. The Service Desk plays the role of "voice of the user" within IT.	2.50	2.33
6	IT is required to deliver a "turnover package" to the service desk for all changes that will impact the user environment. This could include application updates, new desktop software, etc. The turnover package is designed to prepare the service desk to provide support to users in the affected areas.	1.50	2.19
7	Customers are told what to expect on resolution time when their ticket is escalated or if a call-back is required.	3.00	2.90
8	The Service Desk monitors all tickets, including those that are escalated, until ticket closure.	2.00	2.45
9	The value added by the service desk is communicated to key managers in IT, and expectations are formally established regarding service desk roles and responsibilities.	2.50	1.83
10	The Service Desk tracks the number of training related contacts it receives, and provides feedback to user groups within the organization on training areas that could help to reduce service desk contact volumes.	2.00	2.07
11	The Service Desk provides training aids to users that enable them use the service desk more effectively. These could include log-in screens with the service desk phone number, chat windows that can be clicked to initiate a real-time chat session, mouse pads imprinted with the service desk IVR menu, etc.	3.00	2.74
12	The Service Desk transmits outbound messages to users announcing major system and network outages, thereby alerting users about potential problems in the IT environment. These proactive messages help to reduce contact volumes during incidents that impact a large number of users.	3.50	3.51
	Summary Statistics	Total Score **28.5**	**28.9**
		Average Score **2.38**	**2.41**

Best Practices Process Assessment Summary

Best Practices Component	Number of Success Factors	Average Company XYZ Score	Average Peer Group Score
Strategy	7	2.86	2.83
Human Resources	13	3.65	2.58
Process	16	2.91	2.74
Technology	10	2.55	2.12
Performance Measurement	14	3.54	2.26
Communication	12	2.38	2.41
Total Score		**217.5**	**178.9**

*An average score of 4.0 or above is required in each component of the Best Practices Model to achieve Best Practices Certification

Best Practices Process Assessment Summary

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Overall Process Assessment Scores

Key Statistics	
Total Process Assessment Score	
High	332.3
Average -----	178.9
Median	172.3
Low	82.0
Your Score	217.5
World-Class -----	288.0
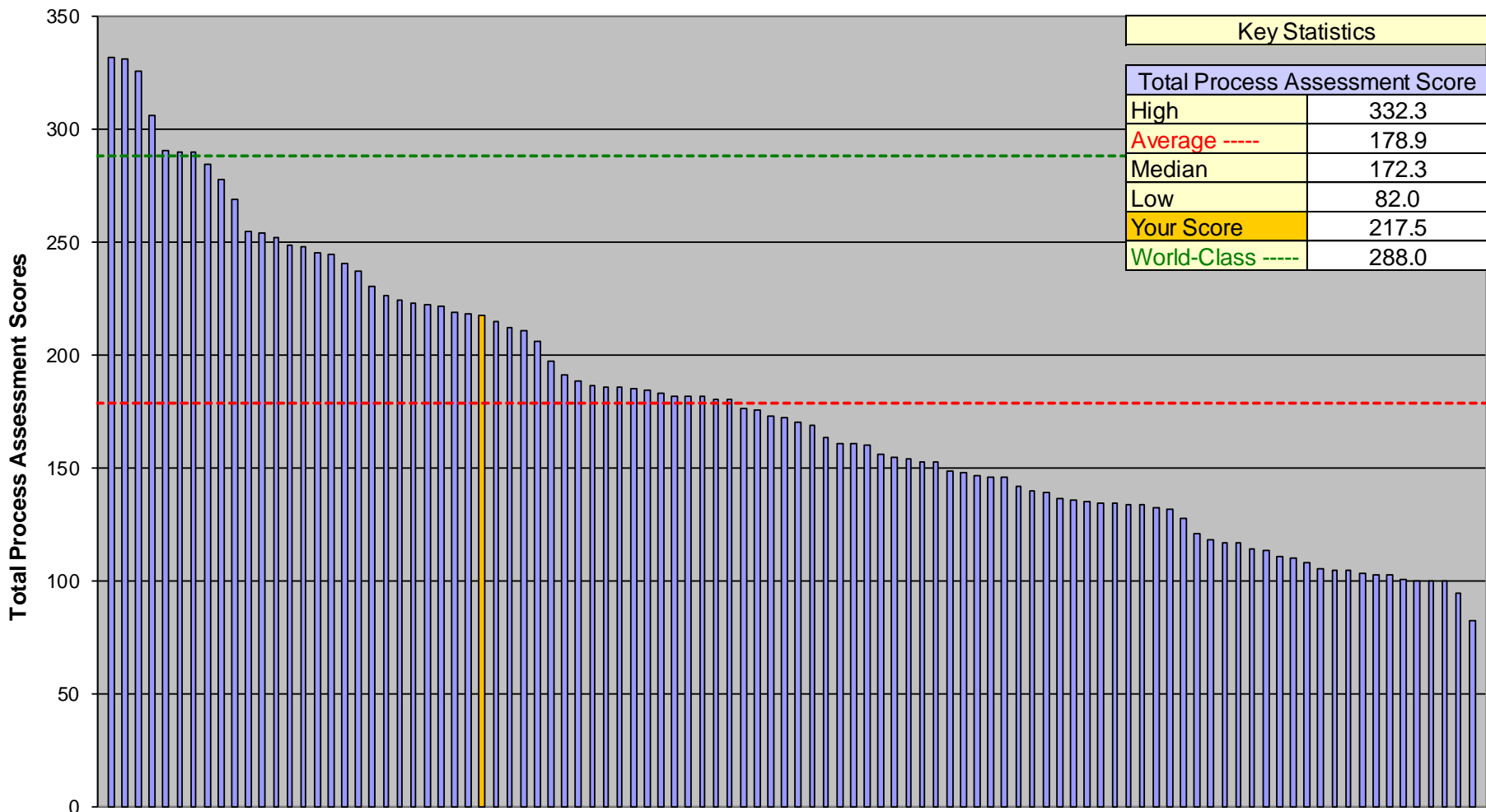
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Process Maturity vs. Scorecard Performance

Company XYZ Performance	
Process Assessment Score	217.5
Balanced Score	62.1%

Average = 178.9

Average = 50.2%

World-Class = 288

Balanced Score

Process Assessment Score

Legend:
- Company XYZ (red)
- Global Database (blue)
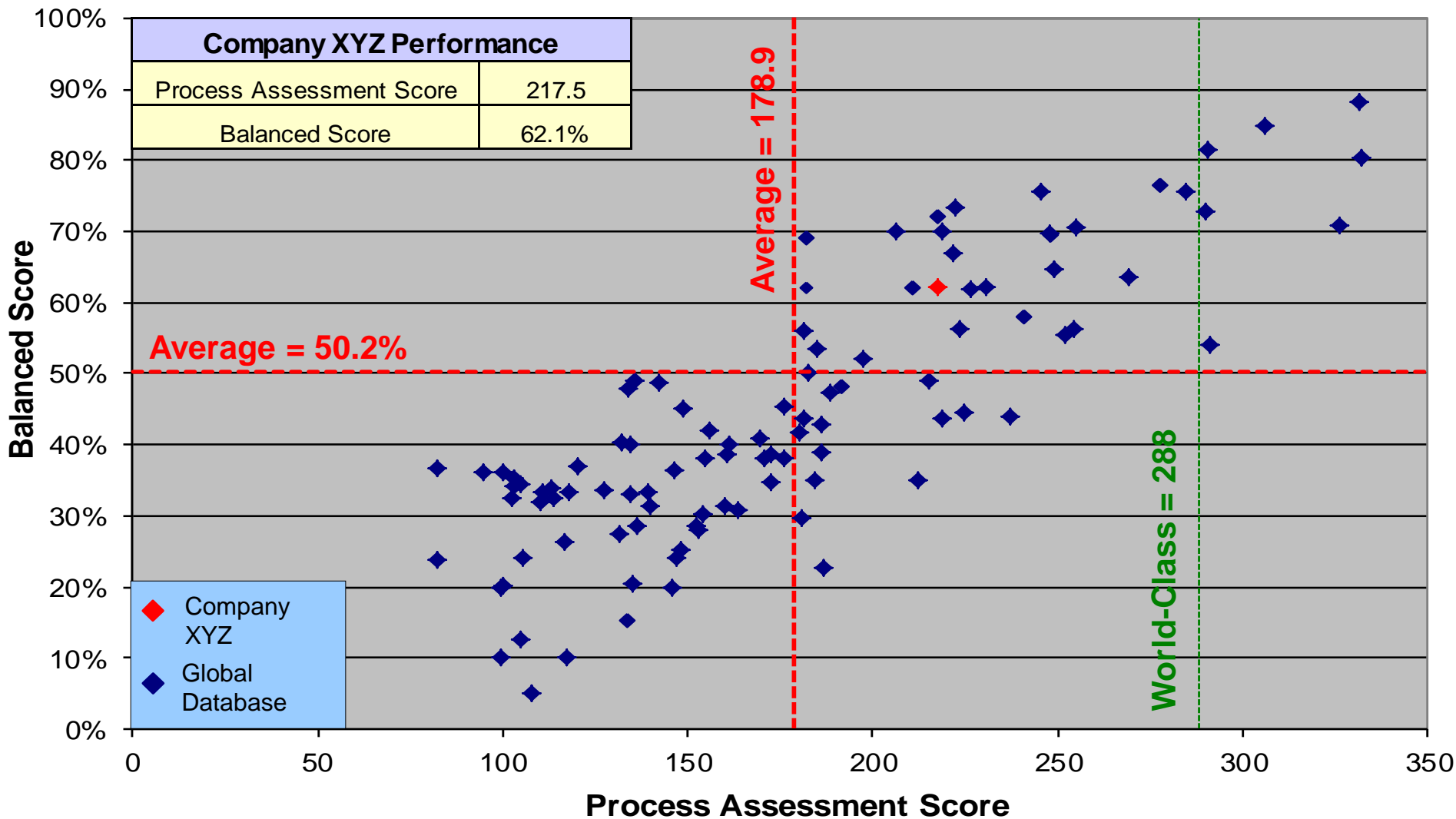
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Interview Themes and Quotes

Company XYZ

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Performance Benchmarking

MetricNet Conducted Fifteen Company XYZ Interviews

Company XYZ Interviewee List	Title
Employee A	Title 01
Employee B	Title 02
Employee C	Title 03
Employee D	Title 04
Employee E	Title 05
Employee F	Title 06
Employee G	Title 07
Employee H	Title 08
Employee I	Title 09
Employee J	Title 10
Employee K	Title 11
Employee L	Title 12
Employee M	Title 13
Employee N	Title 14
Employee O	Title 15

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Key Themes from Company XYZ Interviews

- A majority of the interviewees agree that the agents are stressed and overwhelmed due to the high call volume

- There is a general consensus that the Service Desk needs more agents to handle the increasing call volume

- The lack of space in the Service Desk department is viewed as a concern

- A majority of the interviewees would like to see improved communication between the Service Desk and the other IT groups

- Everyone agrees that finding information within the knowledge base is difficult and this increases the time spent on calls

- Most interviewees have expressed their concern over the long call waiting time

- Everyone would like to see the Service Desk develop a more efficient way to handle the call volume

- There is a general feeling that management does not listen to the concerns of the Service Desk

- Some interviewees expressed the need to have more in-depth training on the applications and programs that are supported

Representative Comments from Company XYZ Interviews

- *"The agents work hard to resolve the issues of the customers."*
- *"The Service Desk needs to build a better partnership with the other IT teams, so that increases in call volume can be anticipated."*
- *"It is frustrating that the Service Desk is getting additional call volume from the Telecom group without the capability to troubleshoot the issues."*
- *"It is a running joke that management won't spend money on the Service Desk. Some agents joke about it while others are angered by it."*
- *"The Service Desk is not taken seriously as a department. It is hard to prove the worth of the Service Desk in the organization."*
- *"Whenever there is an I.S. outing or get-together, the Service Desk can only send 2-3 people because there won't be enough agents left to handle the calls."*
- *"The Service Desk is constantly complimented on how well the agents resolve customer issues. This is why upper management does not think that anything needs to be fixed."*
- *"It would be nice to have a bigger and more ventilated workspace."*
- *"The customers would not be waiting in queue for 10-20 minutes if there were enough agents."*
- *"The request for more staff has been turned down several times. The morale is low because management is sending more work without providing sufficient resources or tools."*

Representative Comments from Company XYZ Interviews

- *"The agents have good teamwork and get along well with each other."*
- *"The password reset tool needs to be improved, so that the call can be resolved quickly and agents can accept additional calls."*
- *"It would be more effective to have an actual training space where the agents can focus on the training materials and not be bothered by distractions."*
- *"More in-depth training in applications and programs will help the agents troubleshoot the issues and will result in higher First Call Resolution."*
- *"The performance goals on knowledge base contributions and project assignments are unfair because there isn't enough time to work on these due to the high call volume."*
- *"The result of the Associate Satisfaction survey does not reflect the true satisfaction level of the agents. The agents only give a high rating in this survey because based on previous experience, scoring low will only produce more work for the agents."*
- *"The agents on the day shift are completely overwhelmed with the volume of calls. The agents are constantly stressed, tired and exhausted at the end of the day."*
- *"Being busy is good, but being busy and overwhelmed are two different things."*
- *"The agents come in sick to avoid causing additional stress on the other agents. Having more agents will allow the sick agents to take a day off instead of coming to work sick and spreading the virus."*
- *"The resolution rate is low because the agents are not trained on the new programs."*

Representative Comments from Company XYZ Interviews

- *"The customer survey results are sometimes low not because the customer dealt with a bad agent, but because the customer waited in queue for so long."*

- *"The agents get a lot of calls to resolve issues on Macs, iPads and iPhones. Having access to these devices would help the agents understand and resolve issues better."*

- *"There needs to be more levels of support within the Service Desk."*

- *"There are a lot of access restrictions preventing agents from resolving simple issues."*

- *"When new technologies are introduced, the IT group responsible should train the Service Desk, so that the agents will know what to do when the customers call in with issues."*

- *"The agents are rushing through the tickets to get to the calls and some mistakes occur because of this."*

- *"Not having a true knowledge base can be a struggle. It affects the agents' ability to have First Call Resolution and it affects the amount of time it takes to resolve issues. This is frustrating for both the agent and the caller."*

- *"The customers need to be more aware of Company XYZ's online tools."*

- *"The agents are well prepared to handle difficult customers."*

- *"The Service Desk would like upper management to have a better perspective of how hard the agents work."*

- *"The agents maintain good humored despite the stressful work environment."*

Representative Comments from Company XYZ Interviews

- *"Having more space, more resources and a true knowledge base will help reduce the agents' stress level."*

- *"There needs to be a clear career path for advancement and for moving to a different position and department."*

- *"The Service Desk needs to find an efficient way to handle the call volume."*

- *"It is difficult to find information in the knowledge base because people call the same thing different names. Using Excel's "Find" option does not give an accurate result."*

- *"The leadership needs to come up with a consistent model for support."*

- *"The Service Desk feels discouraged because the leadership does not listen to the concerns of the Service Desk."*

- *"There are ongoing training sessions for the veteran agents, but these are not formalized."*

- *"It would be nice for the agents to understand the environment in which the customers work."*

- *"The agents are so customer-oriented that the agents sometimes sacrifice break time just to answer the calls."*

- *"If the call volume was manageable, agents would want to stay with Company XYZ longer. Some agents have left the Service Desk due to the overwhelming amount of work."*

Representative Comments from Company XYZ Interviews

- *"The Service Desk is constantly finding ways to streamline the current processes."*

- *"When the call volume is high, the morale goes down and the stress level goes up."*

- *"The Service Desk does not feel treated as part of the IT team."*

- *"The agents are held accountable for their performance and are advised of any corrective actions needed."*

- *"It is frustrating for a doctor to be on queue for so long especially when a patient is waiting. It could be a life or death situation."*

- *"The Application team does not cooperate with the Service Desk. Management needs to make the Application team work more seamlessly with the Service Desk."*

- *"The abandonment rate is high because the Service Desk does not have enough agents to take the calls."*

- *"The Service Desk needs to come up with an easier process for documenting critical incident reports so that the same information is not documented 2-3 times in different places. It takes 10 minutes in between calls to be able to document this properly."*

- *"There are monthly meetings between the agents and supervisors where the agents are given feedback by the supervisors."*

- *"The agents are trained to focus on the customer's issues, but sometimes this is difficult when the customer is constantly berating the agent for being on hold for a long time."*

- *"The other IT departments don't respect the Service Desk."*

Representative Comments from Company XYZ Interviews

- *"The Service Desk needs to identify what the key indicators should be and what the actual measurements should look like."*

- *"There needs to be more structure within the Service Desk. The Service Desk needs to identify what it can and cannot do."*

- *"A lot of the Service Desk processes are 9-10 years old. These need to be reviewed and improved upon."*

- *"More customers will be frustrated if the Service Desk does not address the long queue times."*

- *"The agents would like to have more responsibilities. The agents are not allowed to tackle certain tasks because the other IT teams do not think that the Service Desk is capable."*

- *"The performance goals may be too demanding based on the Service Desk environment and the fact that the staffing ratio is inadequate."*

- *"Some agents come in without knowing where to sit for the day. This is a stressful way to start the day."*

- *"The Service Desk can't afford to have ongoing training for the agents because there are not enough agents on the phones."*

- *"The Service Desk needs a strong leadership that knows how to run a Service Desk and can help guide the staff to go in that direction."*

Representative Comments from Company XYZ Interviews

- *"The First Call Resolution goal is not reasonable because there are a lot of things that the Service Desk can do but are not allowed to do. It is unfair to hold this against the agents when the agents are not allowed to resolve certain issues."*

- *"Telecommuting will help address the Service Desk's lack of space."*

- *"Management needs to promote what the Service Desk does to the rest of the company. The customers need to know what to expect from the Service Desk."*

- *"The ticketing system needs to be integrated with the knowledge base, so that when the agents type in the subject of the ticket, it can immediately start listing information."*

- *"There needs to be a better focus on the services being provided by the Service Desk."*

- *"The agents would feel better if upper management verbally acknowledges the challenges faced by the Service Desk."*

- *"The Service Desk does not have a specific mission, vision, purpose or definition of what we are supposed to be doing. How can we hit a target that is not yet defined?*

- *"When new technologies are introduced, there isn't a good way of maintaining that knowledge in the Service Desk."*

- *"The agents try to address the calls as quickly as possible without trying to rush the caller."*

- *"The agents' performance goals are reasonable. The performance goals are adjusted based on the call volume and the environment."*

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Conclusions and Recommendations

Company XYZ

MetricNet™
Performance Benchmarking

Notable Strengths

The Company XYZ Service Desk has a number of notable strengths.

- Costs are low
  - □ Cost per Inbound Contact, Cost per Minute of Handle Time, and the Price paid to PC Helps are in the top two quartiles

- Customer Satisfaction is in the top quartile
  - □ Customer Satisfaction is the most important measure of quality

- Technician Utilization is well above average
  - □ This is a key driver of Company XYZ's low costs

- Technician Job Satisfaction is the highest in the benchmark!
  - □ This has a positive impact on many other metrics in the service desk

- Company XYZ scored above average on the Best Practices Process Assessment

- Company XYZ performed well above average on the benchmark
  - □ Company XYZ placed 5th out of 23 service desks on the Balanced Scorecard
  - □ First quartile performance overall!

But Opportunities for Improvement Remain

- Service Levels are universally weak

  - All Company XYZ service levels are in the 4th quartile

- First Contact Resolution is the lowest in the benchmark

  - FCR is an important driver of Customer Satisfaction

- Some technician metrics are weak

  - New Technician Training Hours are in the 4th quartile

  - Technician Absenteeism and Tenure are in the 3rd quartile

- Many interviewees opined that a lack of recognition and investment in the Service Desk has created a number of problems, including:

  - Poor integration into the IT department, understaffing, inadequate training, ineffective knowledgebase, access restrictions, and limited career options

Summary of Benchmarking Recommendations

1. Consider transitioning to a Service Desk model that emphasizes Level 1 incident resolution

2. Offer additional agent training that is oriented specifically towards improving First Contact and First Level Resolution Rates

3. Develop and document a formal career path for service desk agents

4. Consider adding additional agent headcount to improve service levels and First Contact/First Level Resolution Rates

   ❑ Four additional agents would be needed to bring Company XYZ into alignment with industry average headcount figures

   ❑ This would also enable agents to spend more time adding solutions to the knowledgebase

5. Consider adopting the MetricNet Service Desk Balanced Scorecard, and update the scorecard monthly

6. Develop an internal communication program to improve the visibility and reputation of the Company XYZ Service Desk

7. Work on improving process maturity and compliance with industry best practices

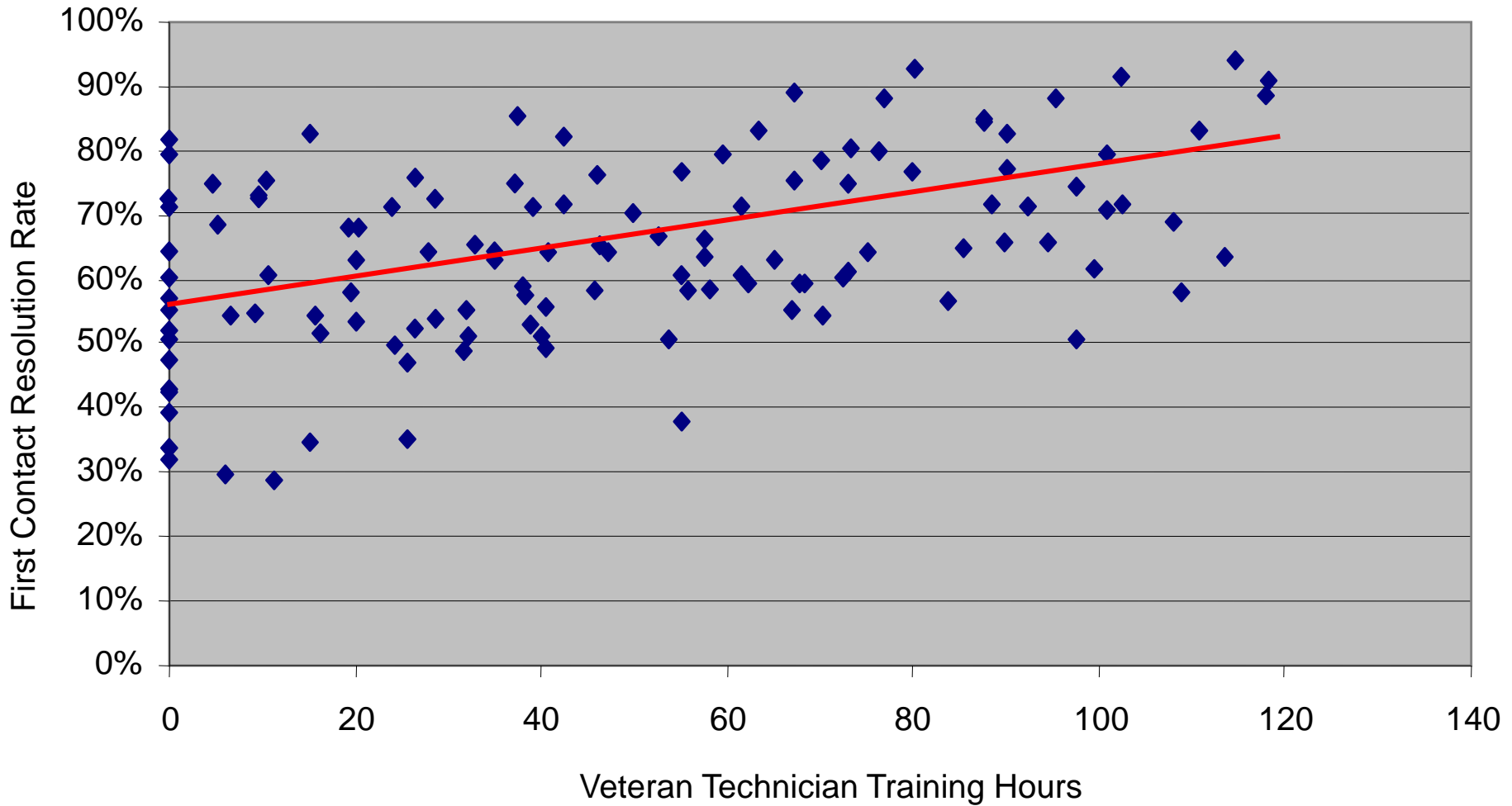# Level 1 Resolution is the Biggest Driver of Support TCO

Support Level	Cost per Ticket
Vendor	$471
Field Support	$196
Level 3 IT (apps, networking, NOC, etc.)	$85
Level 2: Desktop Support	$62
Level 1: Service Desk	$22

Training Can Improve First Contact Resolution Rates

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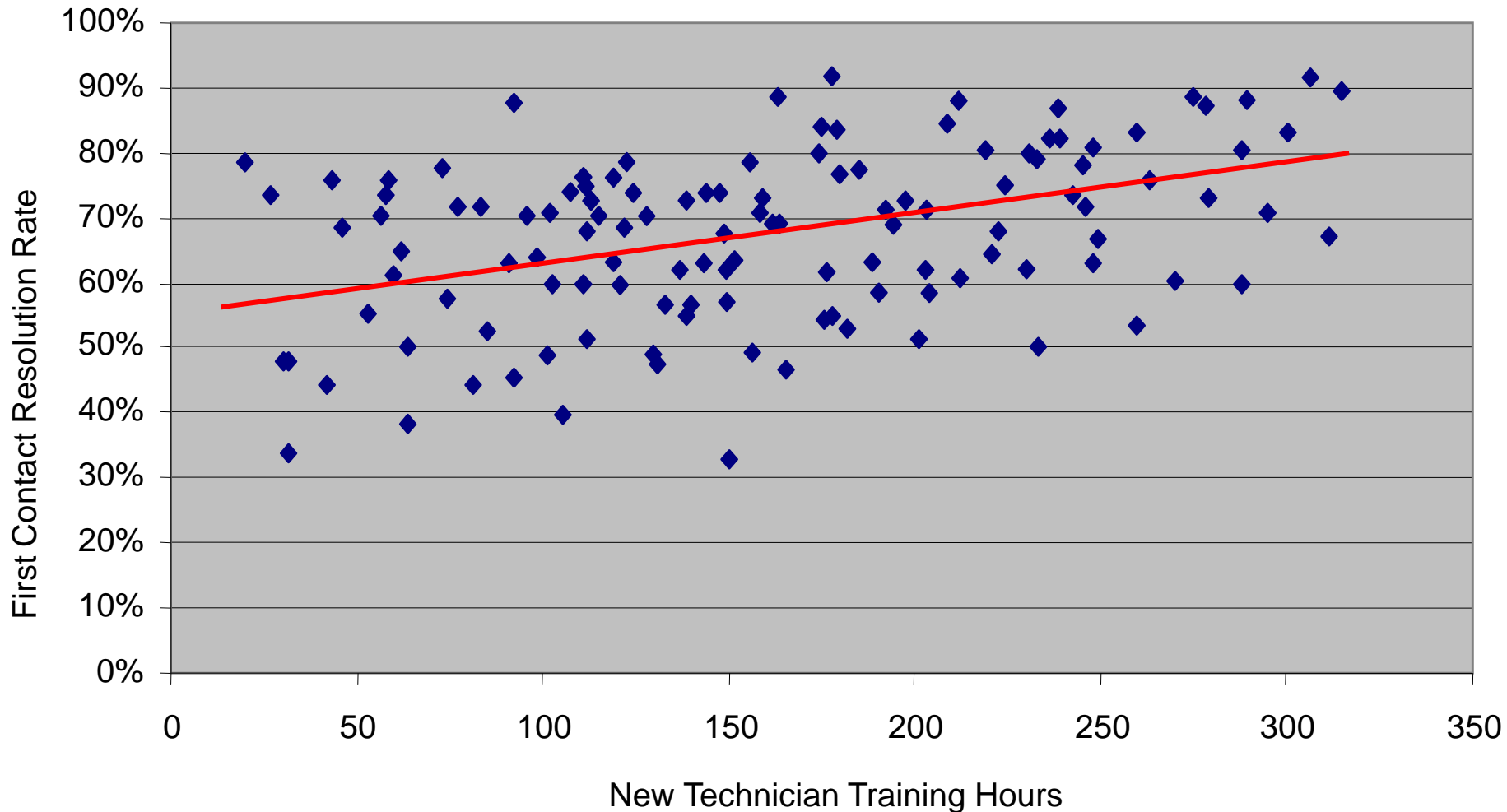
Training Can Improve First Contact Resolution Rates (contd.)

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Training and Career Pathing are Key to Improving Agent Effectiveness
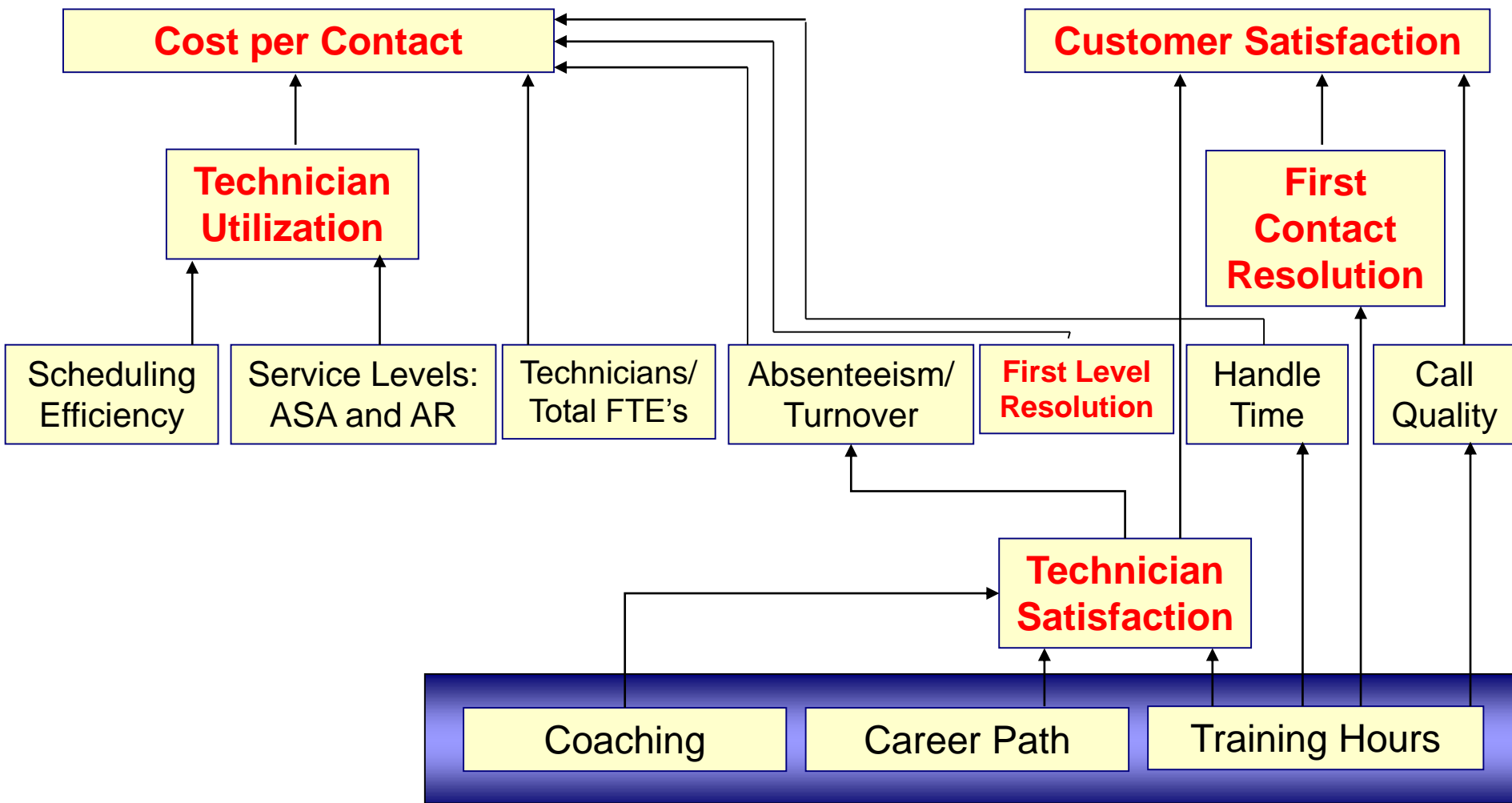
Consider Adopting the Service Desk Balanced Scorecard

Performance Metric	Metric Weighting	Performance Range		Your Performance	Metric Score	Balanced Score
		Worst Case	Best Case			
Cost per Inbound Contact	25.0%	$20.50	$7.09	$8.42	90.1%	22.5%
Customer Satisfaction	25.0%	63.1%	96.7%	87.6%	72.9%	18.2%
Technician Utilization	15.0%	30.8%	62.7%	54.9%	75.5%	11.3%
First Contact Resolution Rate	15.0%	57.6%	91.4%	57.6%	0.0%	0.0%
Technician Job Satisfaction	10.0%	53.3%	99.0%	99.0%	100.0%	10.0%
% of Calls Answered in 30 Seconds	10.0%	2.6%	85.8%	2.6%	0.0%	0.0%
Total	100.0%	N/A	N/A	N/A	N/A	62.1%

Step 1

Six critical performance metrics have been selected for the scorecard

Step 2

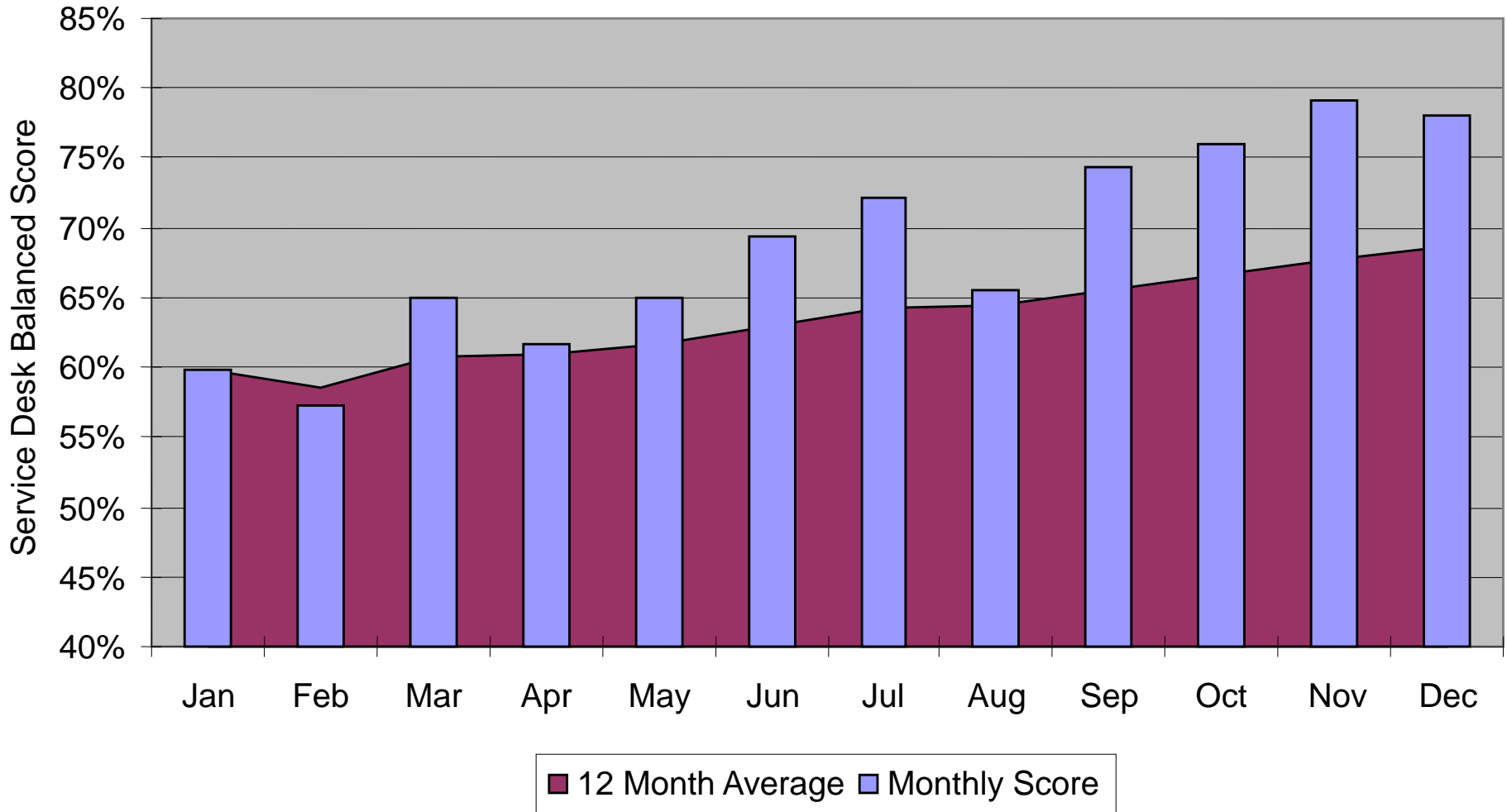Each metric has been weighted according to its relative importance

Step 3

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

Step 4

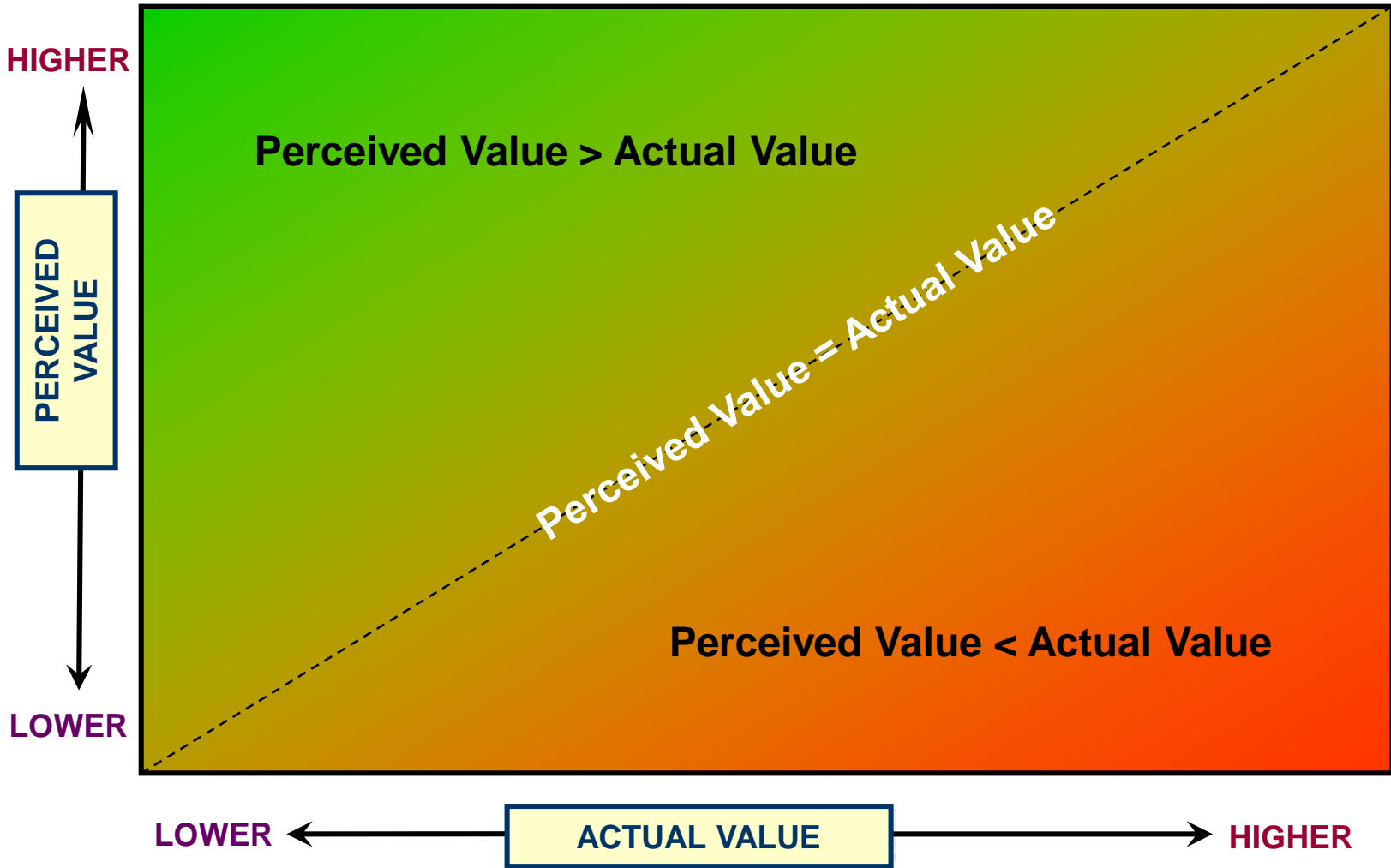Your actual performance for each metric is recorded in this column

Step 5

Your score for each metric is then calculated: (worst case – actual performance) / (worst case –best case) X 100

105

Step 6

Your balanced score for each metric is calculated: metric score X weighting
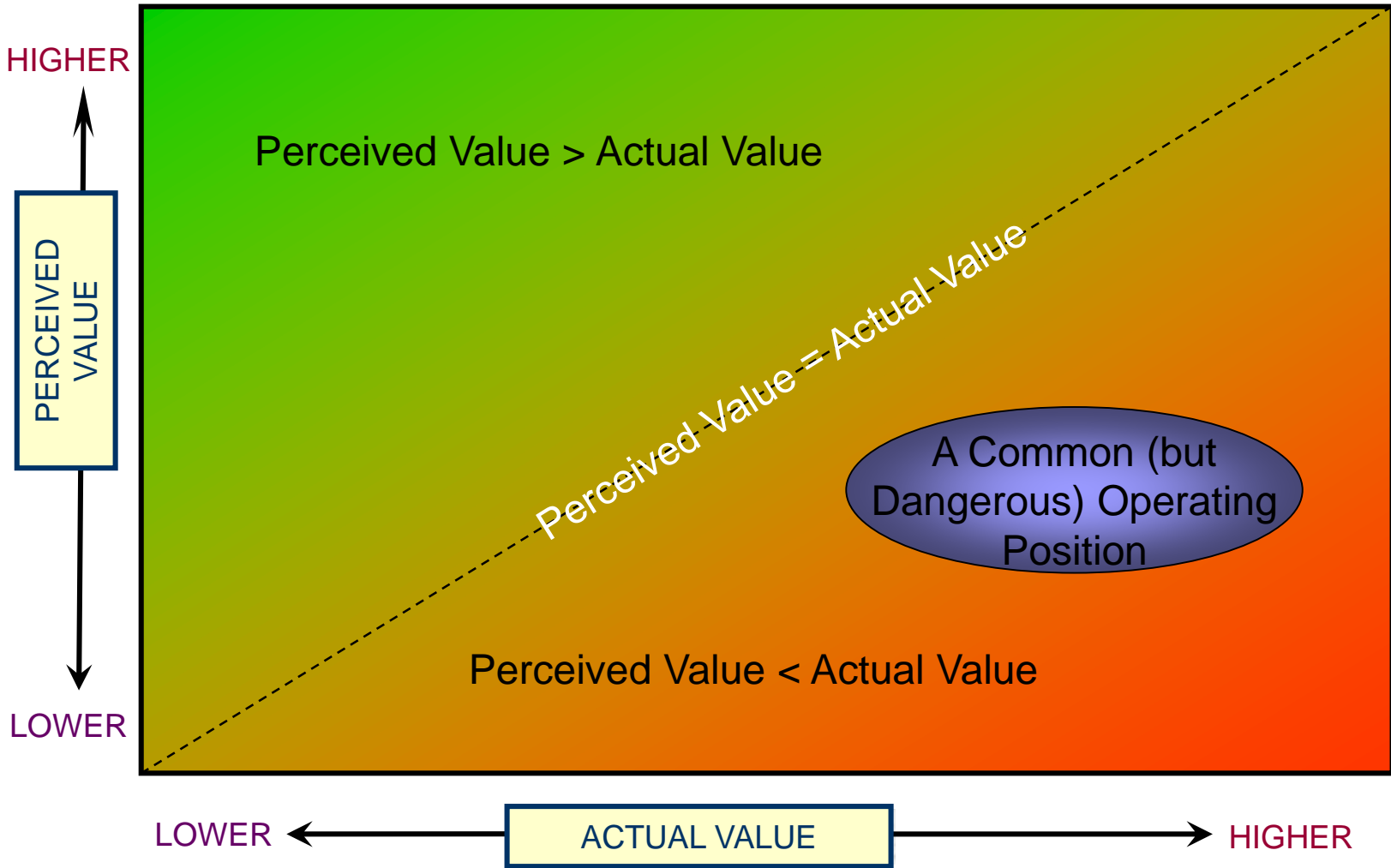
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And Update the Scorecard Monthly

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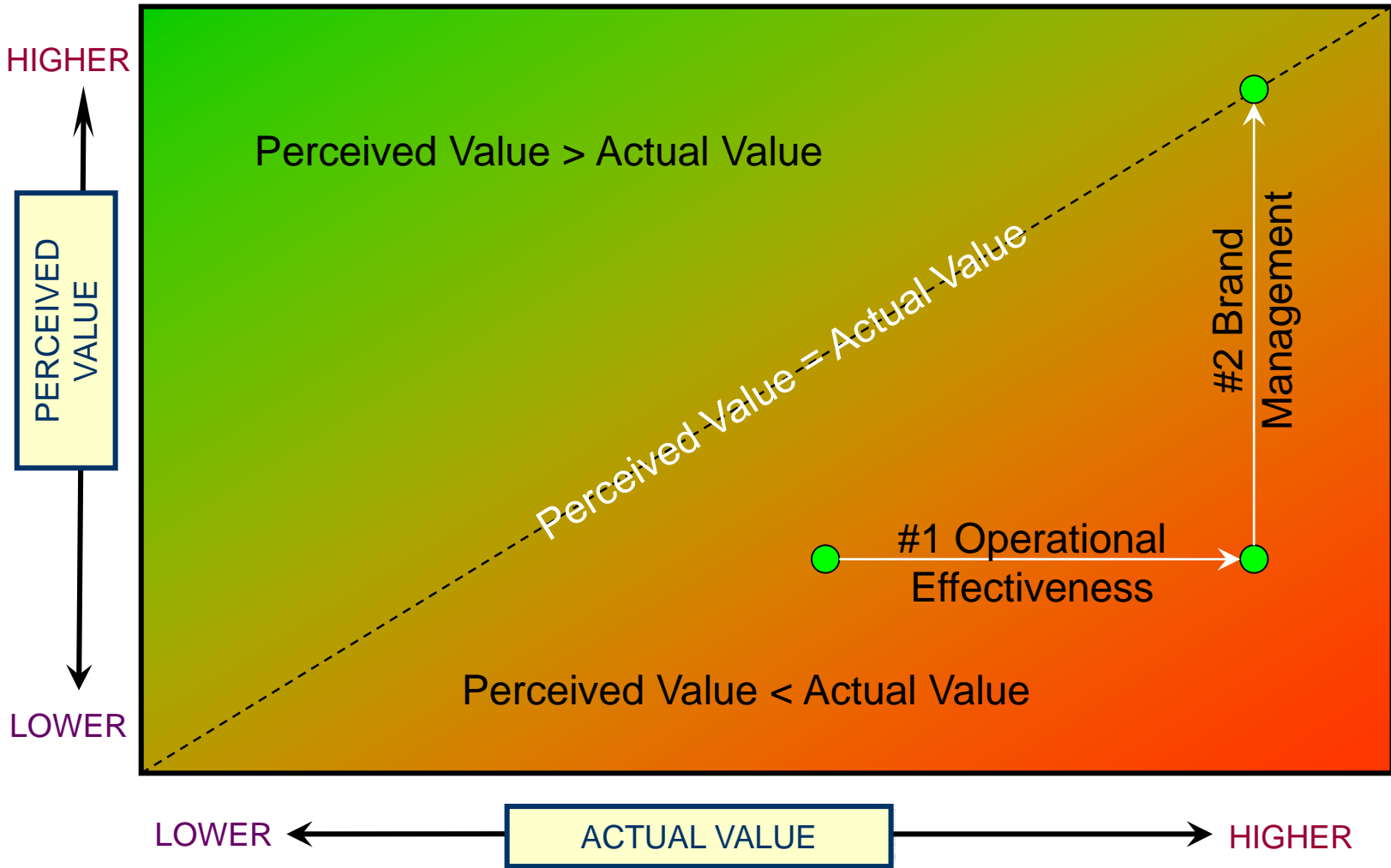# Internal Communication: Positioning Company XYZ for Future Success

Where Does the Company XYZ Service Desk Operate?

HIGHER

PERCEIVED VALUE

LOWER

Perceived Value > Actual Value

Perceived Value = Actual Value

A Common (but Dangerous) Operating Position

Perceived Value < Actual Value

LOWER ← ACTUAL VALUE → HIGHER

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Operational Effectiveness First!

PERCEIVED VALUE

HIGHER

LOWER

Perceived Value > Actual Value

Perceived Value = Actual Value

Perceived Value < Actual Value

#2 Brand Management

#1 Operational Effectiveness

LOWER ← ACTUAL VALUE → HIGHER

Closing the Perception vs. Reality Gap

HIGHER

PERCEIVED VALUE

Perceived Value > Actual Value

Where you Should Be

Perceived Value = Actual Value

Closing the Perception Gap

Where you Are

Perceived Value < Actual Value

LOWER

LOWER ← ACTUAL VALUE → HIGHER
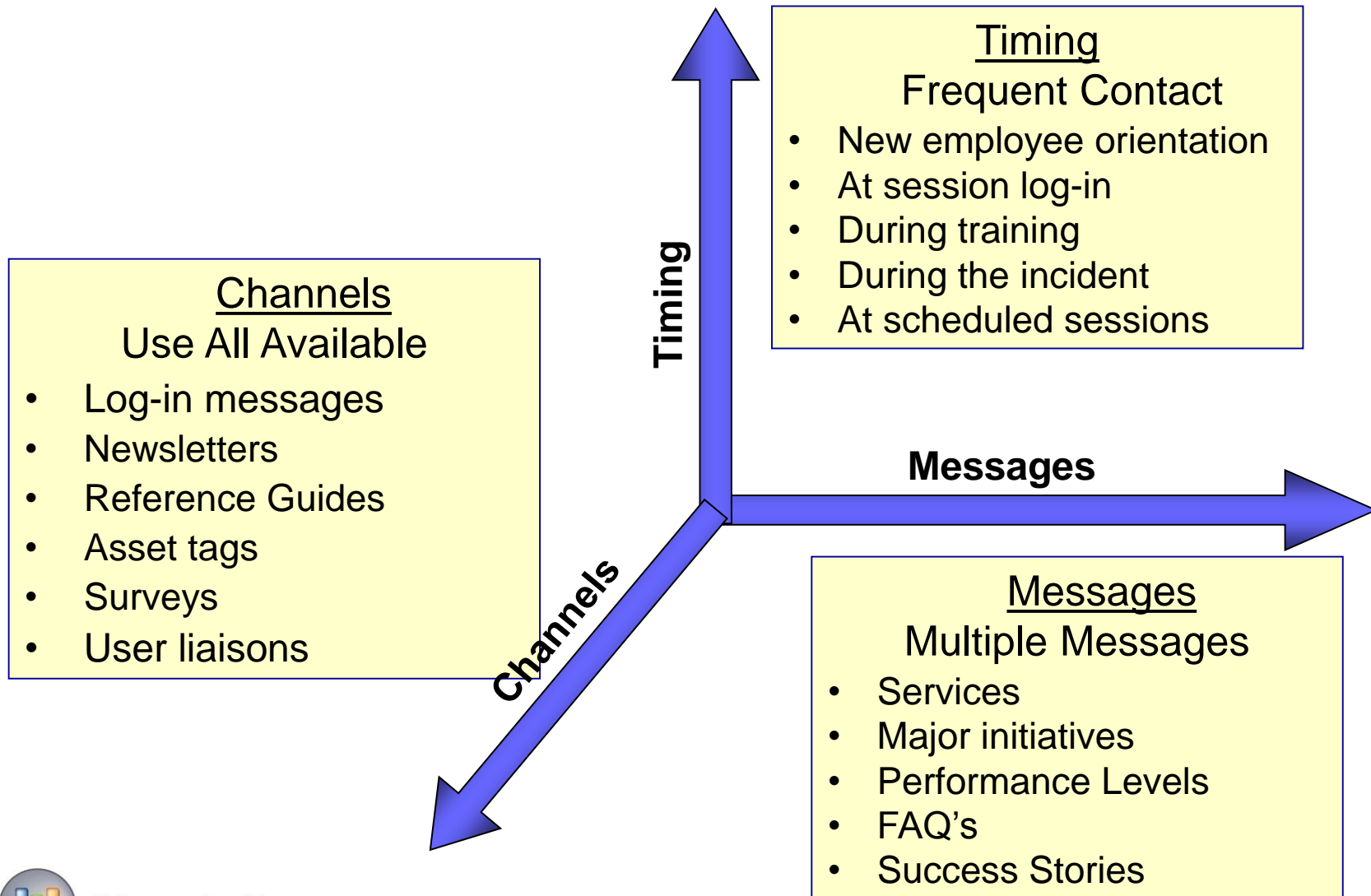
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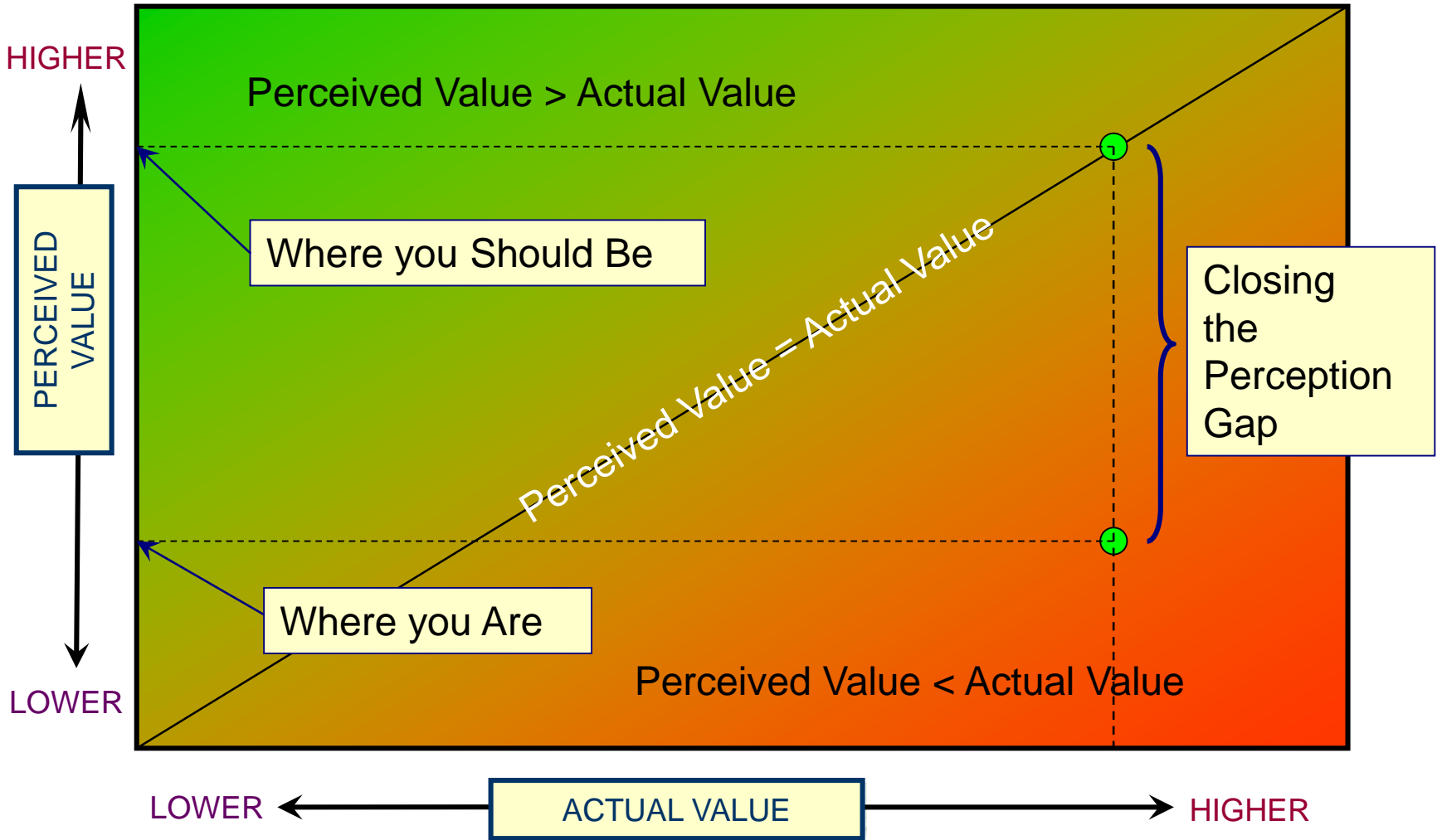
Image Management: The Five W's

1. Who – Who are the Key Stakeholder Groups?

2. What – What are the Key Messages?

3. When – When are You Going to Communicate Them?

4. Where/How – Where/How do You Reach the Stakeholders?

5. Why – Why are We Doing This?

# Key Success Factors in Service Desk Image Management

Timing

Timing
Frequent Contact
- New employee orientation
- At session log-in
- During training
- During the incident
- At scheduled sessions

Channels
Use All Available
- Log-in messages
- Newsletters
- Reference Guides
- Asset tags
- Surveys
- User liaisons

Channels

Messages

Messages
Multiple Messages
- Services
- Major initiatives
- Performance Levels
- FAQ's
- Success Stories

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Why are We Doing This?

We've all heard the expression…

"Expectations Not Set…
are Expectations Not Met!

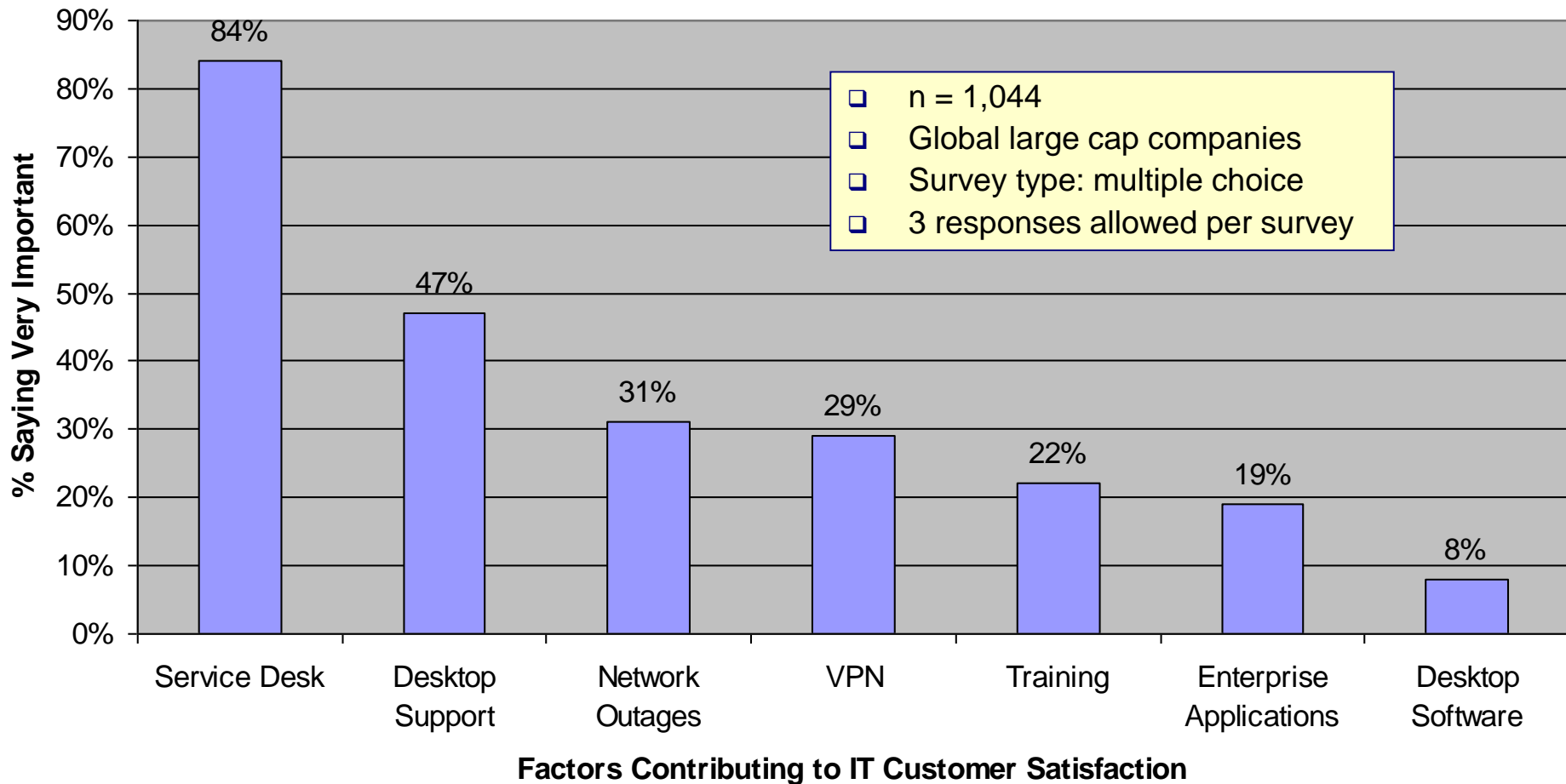So, let's get serious about <u>proactively</u>
<u>managing expectations</u>!
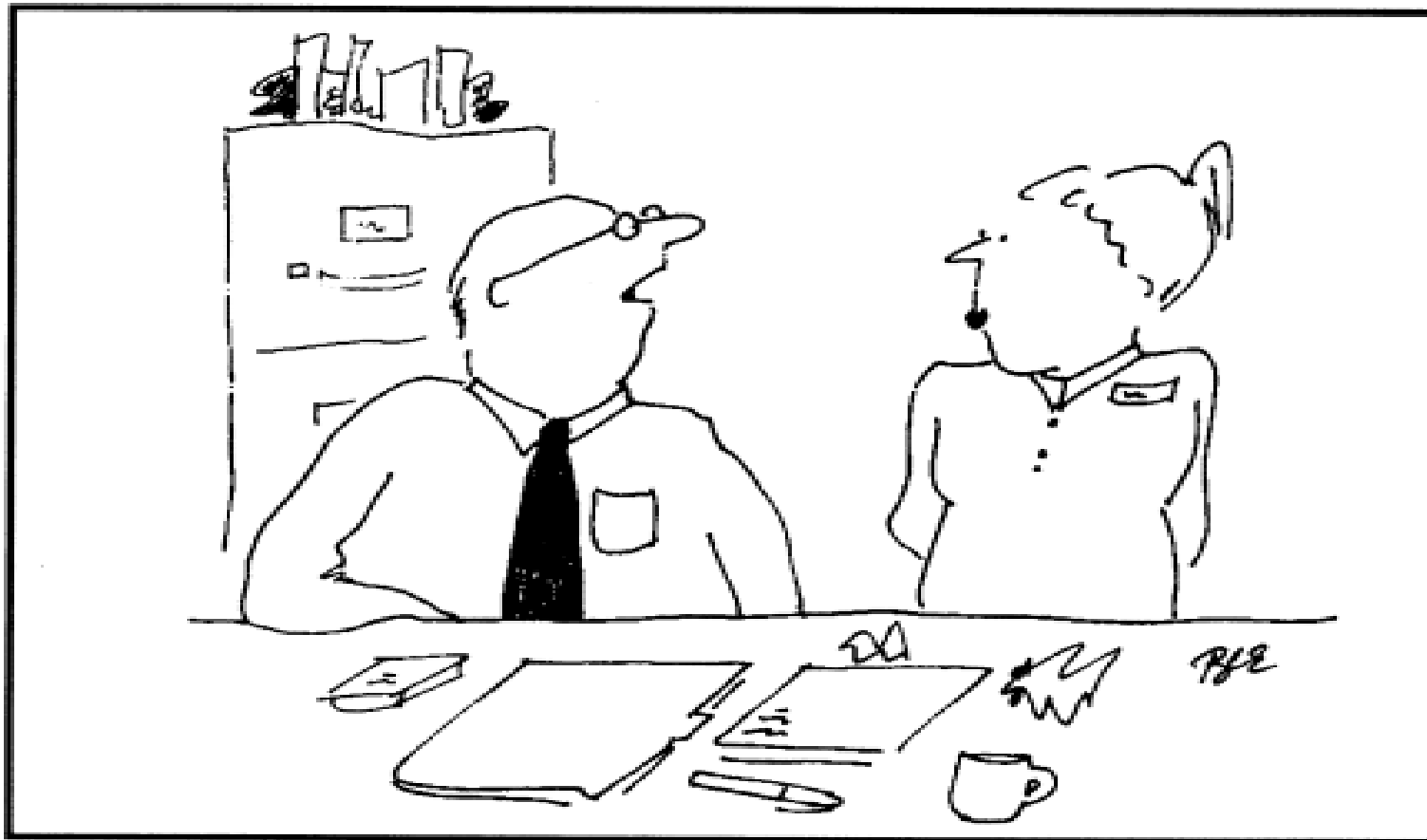
"Delight customers?! Why can't we just satisfy them like we used to?"

Support Drives Customer Satisfaction for *All* of IT

- n = 1,044
- Global large cap companies
- Survey type: multiple choice
- 3 responses allowed per survey

Factors Contributing to IT Customer Satisfaction

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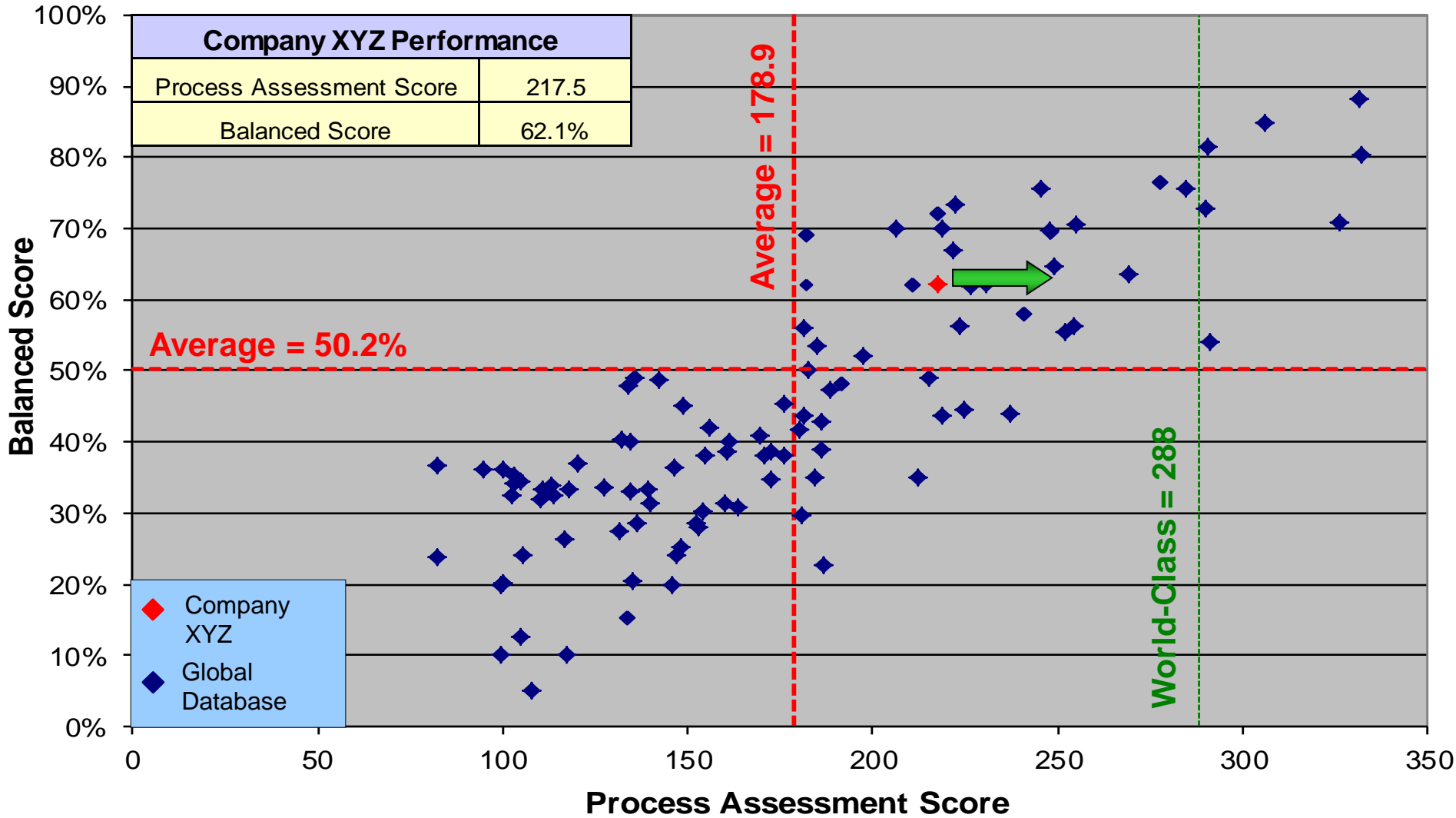- 47% cited desktop support as a very important factor in their overall satisfaction with corporate IT

Company XYZ Internal Communication Summary

- **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 service desk depends as much on your image, as it does on your actual performance!

- **The Benefits of effective Image Management 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

Company XYZ Must Improve Process Maturity Over Time

Company XYZ Performance	
Process Assessment Score	217.5
Balanced Score	62.1%

Average = 178.9

Average = 50.2%

World-Class = 288

Balanced Score

Process Assessment Score

Company XYZ

Global Database

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Best Practice Focus Areas: Strategy

Strategy Best Practices Defined	Company XYZ's Score
The Service Desk has a well-defined mission, vision, and strategy. The vision and strategy are well-documented, and communicated to key stakeholders in the organization.	2.0
The Service Desk has a published Service Catalog, including a Supported Products List, that is distributed and communicated to key stakeholders including end users. The Service Catalog is available on-line.	2.0
The Service Desk has an action plan for continuous improvement. The plan is documented and distributed to key stakeholders in the organization, and specific individuals are held accountable for implementing the action plan.	2.0
The Service Desk is well integrated into the information technology function. The service desk acts as the "voice of the user" in IT, and is involved in major IT decisions and deliberations that affect end users. The Service Desk is alerted ahead of time so that they can prepare for major rollouts, or other changes in the IT environment.	2.5
The Service Desk has OLA's (Operating Level Agreements) with other support groups in the organization (e.g., level 2 support, desktop support, field support, etc.). The OLA's clearly define the roles and responsibilities of each support group, and the different support groups abide by the terms of the OLA's.	3.5
The Service Desk has SLA's that define the level of service to be delivered to users. The SLA's are documented, published, and communicated to key stakeholders in the organization.	4.0
The Service Desk actively seeks to improve Level 1 Resolution Rates, First Contact Resolution Rates, Level 0 Resolution Rates (User Self-Help), and Level -1 (Problem Prevention) Resolution Rates by implementing processes, technologies, and training that facilitate these	4.0

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Best Practice Focus Areas: Human Resources

Human Resources Best Practices Defined	Company XYZ's Score
Veteran agents (more than 6 months of experience) have access to training opportunities to improve their skill set, job performance, and the overall performance of the service desk. Veteran agents are required to complete a minimum number of refresher training hours each year.	2.0
Agents are eligible for incentives and rewards based upon performance. These could include monetary incentives such as annual bonuses, or other incentives such as time off work, gift certificates, etc.	2.0
New hires go through a formal training curriculum, including technical and customer service skills, and are required to pass a proficiency exam before independently handling customer contacts.	3.5
Agents have the opportunity to advance their careers in at least two ways: by improving their technical and customer service skills, and by improving their management and supervisory skills.	3.0
The Service Desk has a formalized and documented recruiting process for filling vacancies. Job requirements are well defined, and candidates are tested for both technical skills, and customer service soft skills.	4.0
Agent training classes and curricula are specifically designed to maximize customer satisfaction, the number of user inquiries resolved at Level 1, and the number of inquiries resolved on First Contact.	4.0
Individual agent training plans are clearly defined, documented and regularly updated.	4.0
The service desk has a formalized, documented agent career path. Agents are made aware of their career advancement opportunities, and are encouraged to proactively manage their careers. Agents are coached at least once yearly on their career path and career advancements options.	4.0
Agents are coached by their supervisor in one-on-one sessions on a monthly basis. Recorded calls are reviewed, and the supervisor provides specific suggestions to each agent on how to improve performance.	4.0
Agents have quantifiable performance goals (e.g., for call quality, customer satisfaction, number of calls handled per month, etc.), and are held accountable for achieving their goals on a monthly basis.	4.0
Agent performance goals are linked to and aligned with the overall Service Desk goals and performance targets.	4.0
Agent Satisfaction surveys are conducted at least once per year, and the results of the survey are used to manage and improve agent morale.	4.0
Formal Performance reviews are scheduled and completed for all personnel at least once annually.	5.0

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Best Practice Focus Areas: Process

Process Best Practices Defined	Company XYZ's Score
Indirect contact channels, including Email, Voice Mail, and Faxes are treated with the same priority as live phone calls and chat sessions. The work queues from these channels are integrated, or worked in parallel.	2.0
Incoming contacts are assigned a severity code based upon the number of users impacted, and the urgency of the incident.	2.0
The Service Desk has a formal, rapid notification and correction process that is activated when a service level has been breached, whether at Level 1, or at some other support level.	2.0
The Service Desk has a well defined service planning and readiness process that works closely with both internal engineering groups and vendors, and continues through product field testing and pre-release. This process enables the Service Desk to train for and prepare for supporting new products and services in the IT environment.	2.0
The Service Desk has contingency plans to handle sudden, unexpected spikes in contact volume. These could include having supervisors and other indirect personnel handle incoming calls during a call spike.	2.5
The Service Desk conducts periodic Root Cause Analysis (RCA) on the user contact profile to eliminate problems at their source.	2.5
System alarms notify the service desk when a service level has been breached, whether at Level 1, or at another support level within the organization.	3.0
Customers are offered a range of access options to the Service Desk, including live voice, voice mail, email, web chat, self-service, fax, and walk-in.	3.0
Rules for escalation and call transfer are well defined and documented. Agents know when and where to transfer or route a call if they are unable to assist the user.	3.0
The Service Desk has contingency plans to handle both short and long term interruptions in service delivery.	3.0
The Service Desk has a formal Knowledge Management Process that facilitates the acquisition, qualification, review, approval, and distribution of knowledge into a Knowledgebase.	3.0
The Service Desk has a mature workforce scheduling process that achieves high agent utilization, while maintaining reasonable service levels.	3.5
The Service Desk has an effective, ongoing process for projecting future workload and staffing requirements.	3.0
The Service Desk is designed as a Single Point of Contact (SPOC) for all IT related problems, issues, and service requests.	4.0
Contact handling processes are standardized, documented, and available online. With few exceptions, the standards are followed by the service desk agents.	4.0
Escalation points are well defined and documented. These include other support groups (e.g., Level 2 support, Deskside Support, etc.), and individuals to whom calls may be escalated.	4.0

Best Practice Focus Areas: Technology

Technology Best Practices Defined	Company XYZ's Score
The Service Desk uses technology alerts/alarms to notify the Service Desk or perform self healing scripts when a customer or system issue is proactively identified.	1.0
The Service Desk has an Automated Password Reset (APR) capability that dramatically reduces the number of password resets that must be performed manually by the Service Desk agents.	2.0
The Service Desk has a multi-year plan for an integrated technology strategy.	2.0
The Service Desk utilizes a capital investment justification process based on ROI, and reports on post installation ROI as part of this process.	2.0
The Service Desk has a comprehensive knowledge management tool that facilitates effective knowledge capture and re-use. Service desk agents are able to quickly find solutions to user problems by searching the knowledge base. Solutions for the vast majority of user problems and questions can be found in the knowledge base.	2.5
The Service Desk knowledgebase is used continuously by all Service Desk agents, and results in higher First Contact and First Level Resolution Rates, and lower contact handle times.	2.5
The incident management system can track and monitor the skill levels of Service Desk agents based on closed tickets by product and/or service code.	2.5
The Service Desk has an effective, integrated self-service portal that is available to all users. The self-service portal provides information, FAQ's, and solutions to problems that are more complex than simple password resets. The tool includes a direct link to service desk technicians. Users are aware of the self-service portal, and usage rates are continuously increasing.	3.0
The Service Desk has a full-featured incident management system that facilitates effective incident tracking, service level compliance, reporting, and root cause analysis.	4.0
The Service Desk has an effective tool that allows agents to proxy into a user's computer, take control of the computer, and remotely perform diagnostics and problem solving (e.g., Tivoli, Bomgar, GoTo Assist, etc.). The tool increases both first contact and first level resolution rates, and reduces contact handle times.	4.0

Best Practice Focus Areas: Performance Measurement

Performance Measurement Best Practices Defined	Company XYZ's Score
The Service Desk tracks the Mean Time to Resolve (MTR), and the Percentage of tickets resolved within 24, 48, and 72 hours.	2.0
Cost per Contact is measured, recorded, and tracked on an ongoing basis.	3.0
The Service Desk maintains a balanced scorecard that provides a single, all-inclusive measure of service desk performance.	3.0
The Service Desk tracks the number of incidents that are resolved outside of the Level 1 Service desk (e.g., at Level 2, Desktop Support, etc.) that could have been resolved by the service desk at Level 1.	3.0
The Service Desk conducts benchmarking at least once per year.	3.0
Agent Utilization is measured, recorded, and tracked on an ongoing basis.	3.5
Customer Satisfaction is measured, recorded, and tracked on an ongoing basis.	4.0
First Contact Resolution is measured, recorded, and tracked on an ongoing basis.	4.0
First Level Resolution is measured, recorded, and tracked on an ongoing basis.	4.0
Agent Satisfaction is measured, recorded, and tracked.	4.0
The Service Desk conducts event driven customer surveys whereby the results of customer satisfaction surveys can be linked back to a specific incident, and to a specific agent handling the contact at the service desk.	4.0
Service Desk measures are used holistically, and diagnostically to identify performance gaps in Service Desk performance, and to prescribe actions that will improve performance.	4.0
Service Desk KPI's are used to establish "stretch" goals.	4.0
The Service Desk understands key correlations and cause/effect relationships between the various KPI's. This enables the Service Desk to achieve desired performance goals by leveraging and driving the underlying "causal" metrics.	4.0

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Best Practice Focus Areas: Communication

Communication Best Practices Defined	Company XYZ's Score
The Service Desk has established User Group Liaisons who represent different groups within the user community. The Service Desk meets periodically with the liaisons to learn about user concerns and questions, and to communicate Service Desk services, plans, and initiatives.	1.0
The Service Desk meets frequently with user groups, and holds "informational briefings" to educate users on supported products and services, hours of operation, training opportunities, tips for getting the most benefit from the service desk, etc.	1.0
IT is required to deliver a "turnover package" to the service desk for all changes that will impact the user environment. This could include application updates, new desktop software, etc. The turnover package is designed to prepare the service desk to provide support to users in the affected areas.	1.5
The Service Desk monitors all tickets, including those that are escalated, until ticket closure.	2.0
The Service Desk tracks the number of training related contacts it receives, and provides feedback to user groups within the organization on training areas that could help to reduce service desk contact volumes.	2.0
The Service Desk meets frequently with other IT managers, and is an integral part of key decisions made within IT. The Service Desk plays the role of "voice of the user" within IT.	2.5
The value added by the service desk is communicated to key managers in IT, and expectations are formally established regarding service desk roles and responsibilities.	2.5
Customers are told what to expect on resolution time when their ticket is escalated or if a call-back is required.	3.0
The Service Desk has a formal communications schedule, and provides customized content for each stakeholder group.	3.0
The Service Desk provides training aids to users that enable them use the service desk more effectively. These could include log-in screens with the service desk phone number, chat windows that can be clicked to initiate a real-time chat session, mouse pads imprinted with the service desk IVR menu, etc.	3.0
The Service Desk maintains active communication with all stakeholder groups, including service desk employees, IT managers, company managers outside of IT, and customers.	3.5
The Service Desk transmits outbound messages to users announcing major system and network outages, thereby alerting users about potential problems in the IT environment. These proactive messages help to reduce contact volumes during incidents that impact a large number of users.	3.5

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Some Suggested Performance Targets

Performance Metric	Current Performance	Target Performance
First Contact Resolution Rate	57.6%	**75.0%**
First Level Resolution Rate	N/A	**85.0%**
Average Speed of Answer (ASA) (seconds)	124	**90**
% of Calls Answered in 30 Seconds	2.6%	**40.0%**
Call Abandonment Rate	15.3%	**7.0%**
New Technician Training Hours	100	**140**
Service Desk Balanced Score	**62.1%**	**74.3%**

Achieving the performance targets recommended above will increase the Company XYZ Balanced Score from 62.1% to 74.3%, and put Company XYZ in the top position on the Balanced Scorecard.

Detailed Benchmarking Comparisons

Company XYZ

M e t r i c N e t™
Performance Benchmarking

Cost and Price Metrics

Company XYZ

MetricNet
Performance Benchmarking

Cost Metrics: Cost per Inbound Contact

Definition

Cost per Inbound Contact is the total annual operating expense of the Service Desk divided by the annual inbound contact volume of the Service Desk. Operating expense includes all employee salaries, overtime pay, benefits, and incentive compensation, contractor costs, facilities expense, telecom costs, desktop computing, software licensing, training, travel, office supplies, and miscellaneous expenses. Contact volume includes contacts from all sources: live voice, voice mail, Email, web, fax, etc.

Why it's Important

Cost per Contact is one of the most important Service Desk metrics. It is a measure of how efficiently your Service Desk conducts its business. A higher than average Cost per Contact is not necessarily a bad thing, particularly if accompanied by higher than average quality levels. Conversely, a low Cost per Contact is not necessarily good, particularly if the low cost is achieved by sacrificing Call Quality or service levels. Every Service Desk should track and trend Cost per Contact on a monthly basis.
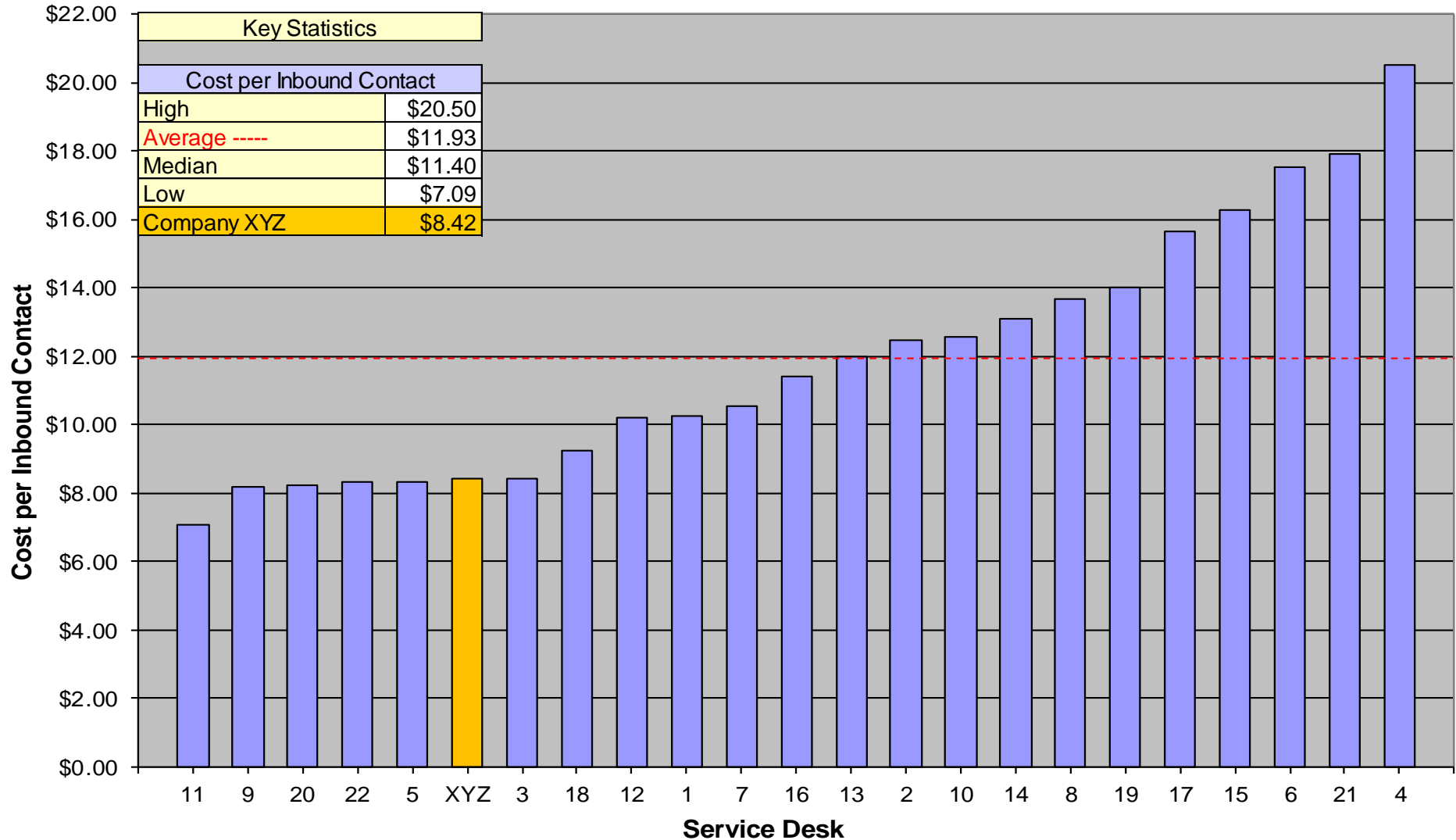
Key Correlations

Cost per Contact is strongly correlated with the following metrics:

- Technician Utilization
- First Contact Resolution Rate
- Contact Handle Time
- Self-Serve Completion Rate
- Average Speed of Answer

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Cost Metrics: Cost per Inbound Contact

Key Statistics	
Cost per Inbound Contact	
High	$20.50
Average -----	$11.93
Median	$11.40
Low	$7.09
Company XYZ	$8.42

Cost Metrics: Cost per Minute of Inbound Handle Time

Definition

Cost per Minute of Inbound Handle Time is simply the Cost per Contact divided by the Average Inbound Contact Handle Time. The Average Inbound Contact Handle Time includes all inbound contacts: voice calls, voice mail, email, web chat, walk-in, etc.

Why it's Important

Unlike Cost per Inbound Contact, which does not take into account the Contact Handle Time or call complexity, Cost per Minute of Inbound Handle Time is a measure of the per minute cost of providing customer support. It enables a more direct comparison of costs between Service Desks because it is independent of the types of contacts that come into the Service Desk and the complexity of those contacts.
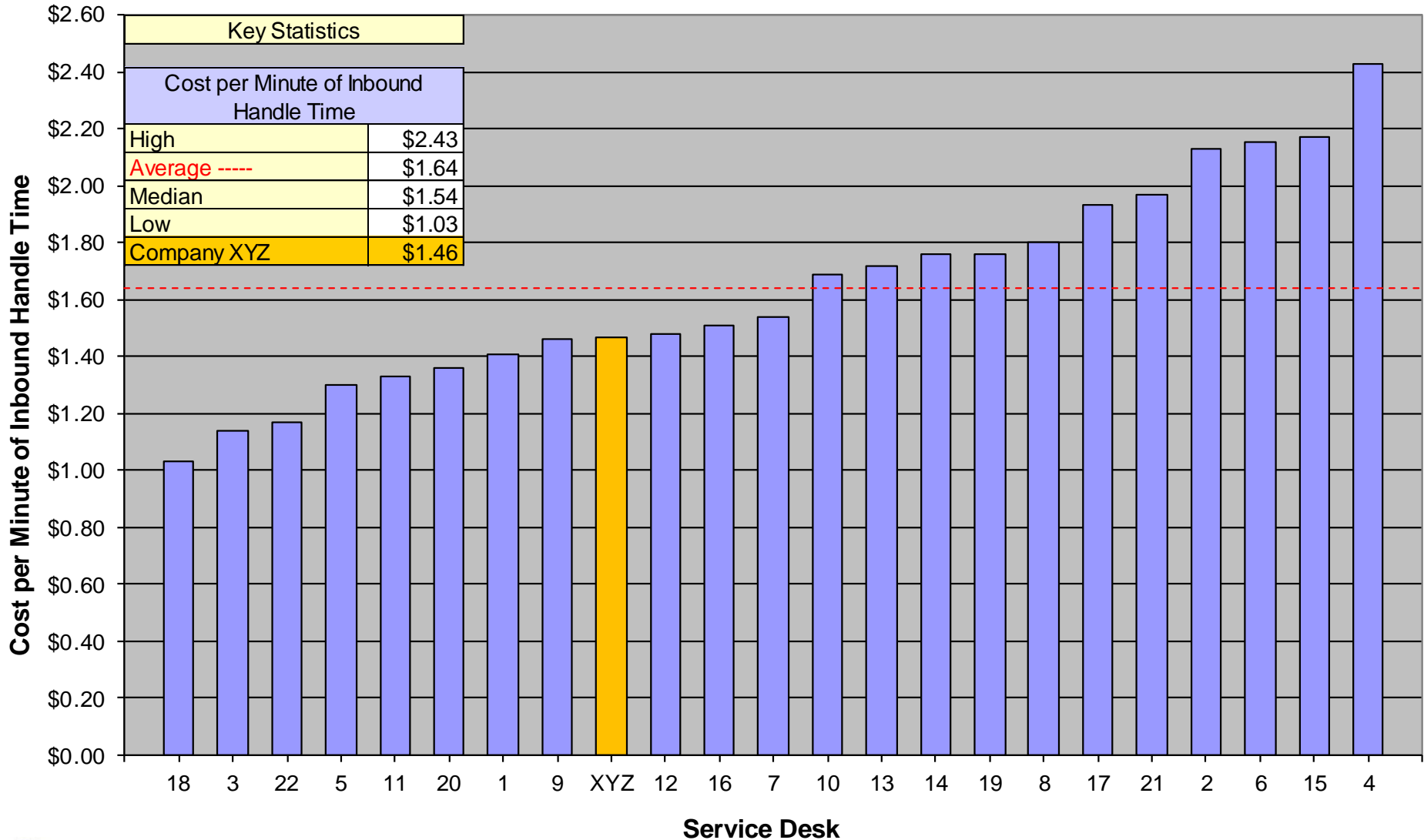
Key Correlations

Cost per Minute of Inbound Handle Time is strongly correlated with the following metrics:

- Technician Utilization
- First Contact Resolution Rate
- User Self-Serve Completion Rate
- Average Speed of Answer
- Inbound Contacts as a % of Total Contacts

Cost Metrics: Cost per Minute of Inbound Handle Time

Key Statistics	
Cost per Minute of Inbound Handle Time	
High	$2.43
Average -----	$1.64
Median	$1.54
Low	$1.03
Company XYZ	$1.46

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Price Metrics: Price per Inbound Contact

Definition

Price per Inbound Contact is the amount paid to the outsourcer for each inbound contact handled. It is typically calculated by dividing the annual fee paid to the outsourcer by the annual inbound contact volume. Contact volume includes contacts from all sources: live voice, voice mail, Email, web, fax, etc.

Why it's Important

Price per Inbound Contact is one of the most important Service Desk metrics. It is a measure of contract efficiency and effectiveness with your outsourcer. A higher than average Price per Inbound Contact is not necessarily a bad thing, particularly if accompanied by higher than average quality levels. Conversely, a low Price per Inbound Contact is not necessarily good, particularly if the low price is achieved by sacrificing Customer Satisfaction or service levels. Every outsourced Service Desk should track and trend Price per Inbound Contact on an ongoing basis.
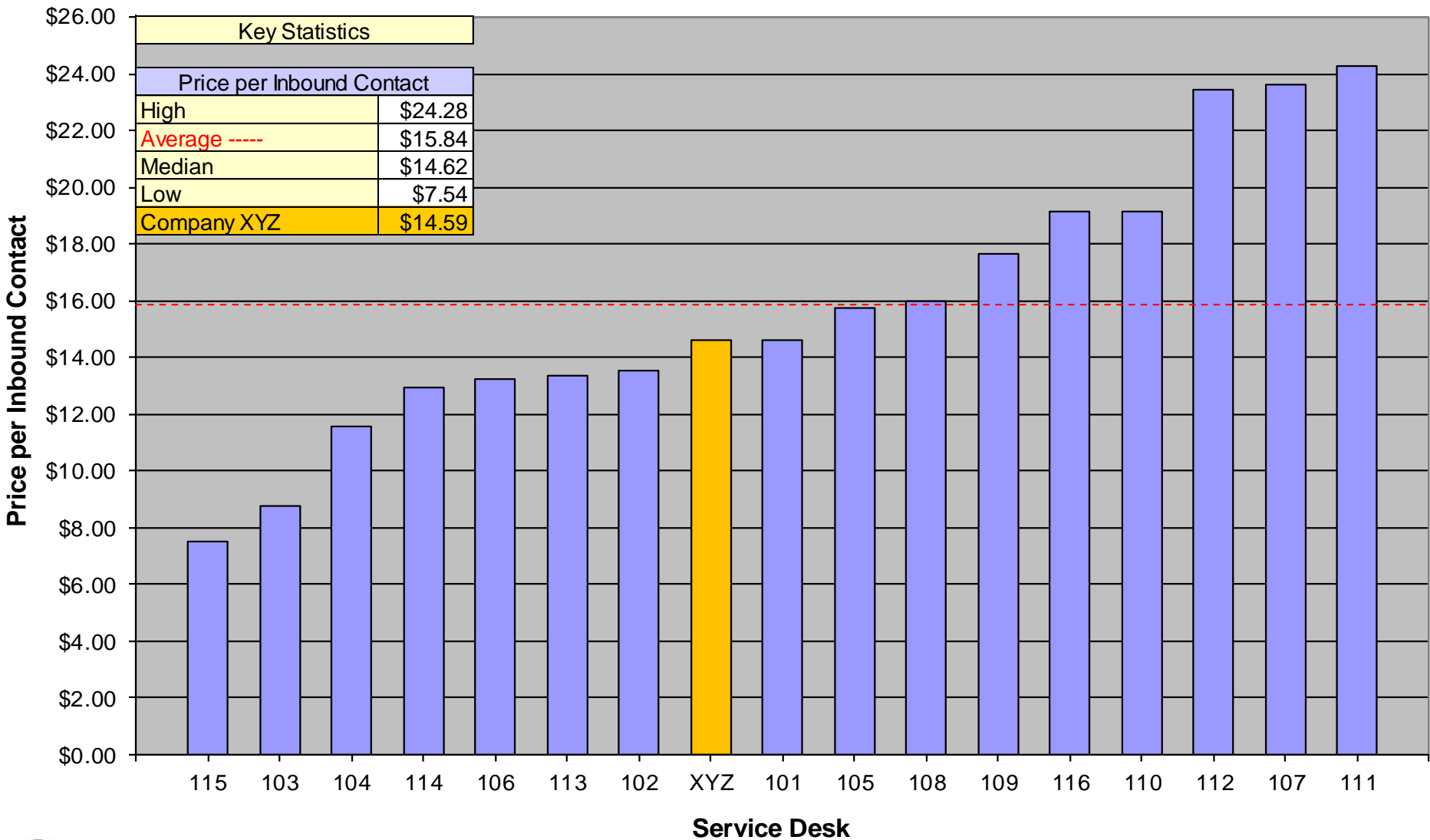
Key Correlations

Price per Inbound Contact is strongly correlated with the following metrics:

- Agent Utilization
- First Contact resolution rate
- Inbound Contact Handle Time
- User Self-Service Completion Rate
- Average Speed of Answer

Price Metrics: Price per Inbound Contact (PC Helps)

Key Statistics	
Price per Inbound Contact	
High	$24.28
Average -----	$15.84
Median	$14.62
Low	$7.54
Company XYZ	$14.59

MetricNet

Price Metrics: Price per Minute of Handle Time

Definition

Price per Minute of Handle Time is simply the Price per Contact divided by the average Inbound Contact Handle Time.

Why it's Important

Unlike Price per Contact, which does not take into account the Contact Handle Time or call complexity, Price per Minute of Handle Time is a measure of the per minute price paid to your outsourcer for providing technical support. It enables a more direct comparison of price between service desks and outsourcers because it is independent of the types of calls that come into the service desk and the complexity of those calls.
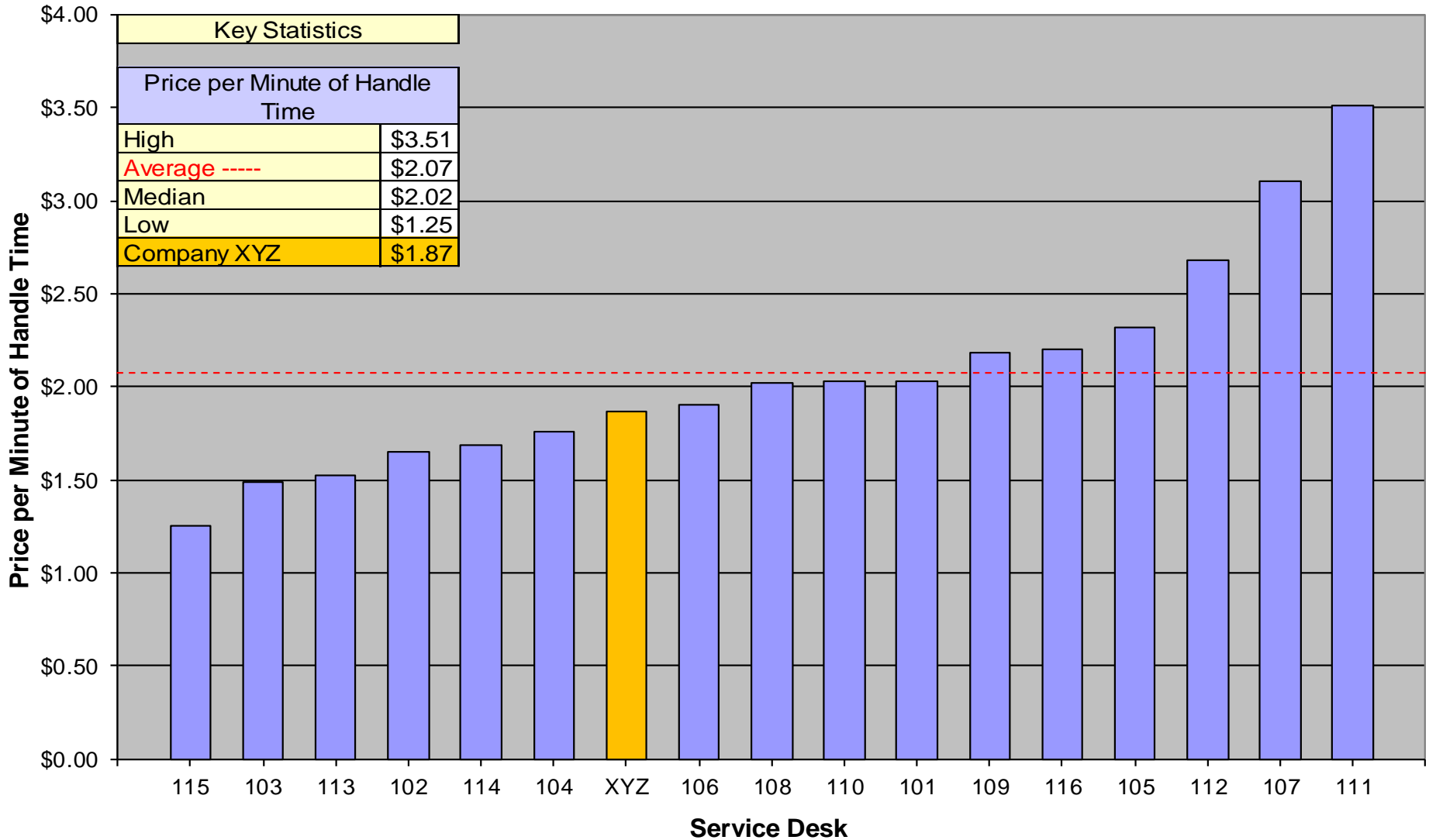
Key Correlations

Price per Minute of Handle Time is strongly correlated with the following metrics:

- Agent Utilization
- First Contact Resolution Rate
- User Self-Service Completion Rate
- Average Speed of Answer

MetricNet

Price Metrics: Price per Minute of Handle Time (PC Helps)

Key Statistics	
Price per Minute of Handle Time	
High	$3.51
Average -----	$2.07
Median	$2.02
Low	$1.25
Company XYZ	$1.87

Service Desk

Cost Metrics: First Level Resolution Rate

Definition

First Level Resolution Rate is the number of incidents resolved in the Service Desk, divided by all incidents that can *potentially* be resolved at the Service Desk. Any incident that is pushed out to another support level (Desktop Support, Level 2 IT support, Vendor Support, etc.) is, by definition, not resolved at Level 1. Incidents than cannot be resolved at Level 1, such as a hardware failure, do not count in the First Level Resolution Rate. MetricNet considers this a cost metric since it has a strong impact on Total Cost of Ownership for end-user support

Why it's Important

First Level Resolution is a measure of the overall competency of the Service Desk, and is a proxy for Total Cost of Ownership (TCO). A high First Level Resolution Rate helps to minimize TCO because each contact that is resolved at Level 1 avoids a higher cost of resolution at Level n (IT, Desktop Support, Vendor Support, etc.). Service Desks can improve their First Level Resolution Rates through training, and investments in certain technologies such as remote diagnostic tools, and knowledge management systems.
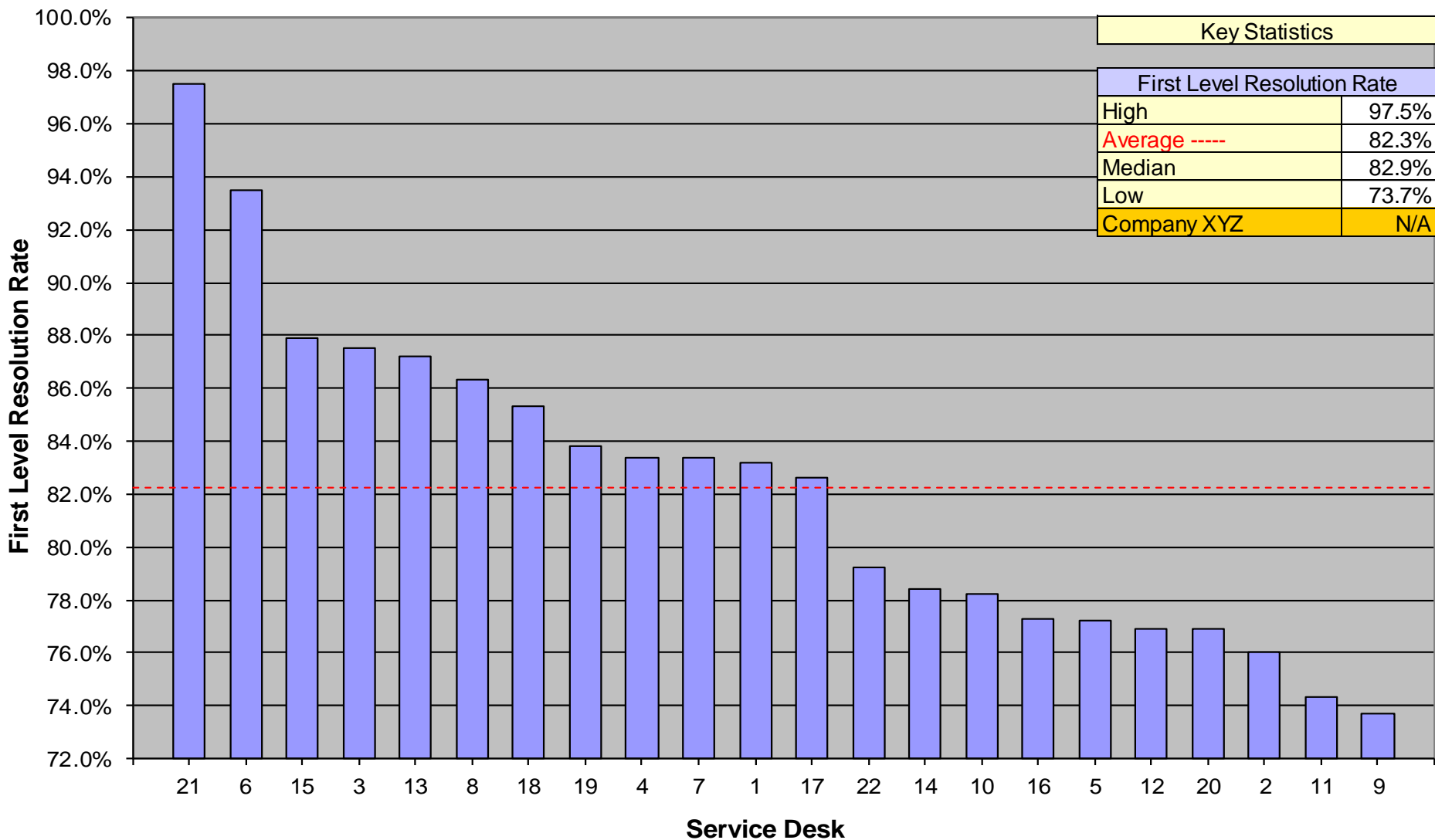
Key Correlations

First Level Resolution is strongly correlated with the following metrics:
- First Contact Resolution Rate
- New Technician Training Hours
- Annual Technician Training Hours
- Cost per Inbound Contact
- Total Cost of Ownership

M e t r i c N e t

Cost Metrics: First Level Resolution Rate

Key Statistics	
First Level Resolution Rate	
High	97.5%
Average -----	82.3%
Median	82.9%
Low	73.7%
Company XYZ	N/A

Service Desk: 21, 6, 15, 3, 13, 8, 18, 19, 4, 7, 1, 17, 22, 14, 10, 16, 5, 12, 20, 2, 11, 9

Service Desk

Productivity Metrics

Company XYZ

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Performance Benchmarking

Productivity Metrics: Inbound Contacts per Technician per Month

Definition

Inbound Contacts per Technician per Month is the average monthly inbound contact volume divided by the average Full Time Equivalent (FTE) Technician headcount. Contact volume includes contacts from all sources: live voice, voice mail, Email, web, fax, etc. Technician headcount is the average FTE number of employees and contractors handling customer contacts.

Why it's Important

Inbound Contacts per Technician per Month is an important indicator of Technician productivity. A low number could indicate low Technician Utilization, poor scheduling efficiency or schedule adherence, or a higher than average Contact Handle Time. Conversely, a high number of Technician handled contacts may indicate high Technician Utilization, good scheduling efficiency and schedule adherence, or a lower than average Contact Handle Time. Every Service Desk should track and trend this metric on a monthly basis.
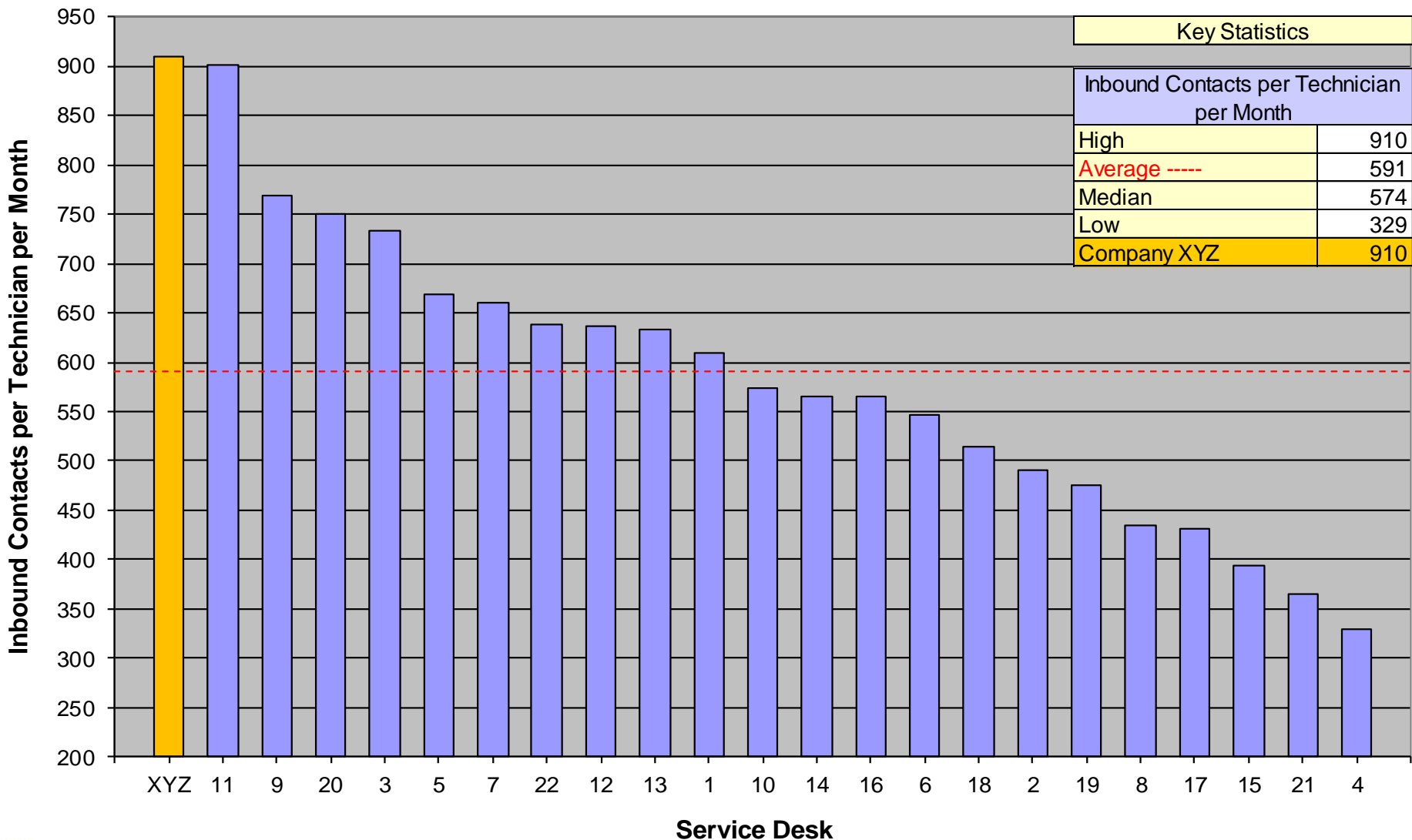
Key Correlations

Inbound Contacts per Technician per Month is strongly correlated with the following metrics:

- Technician Utilization
- Inbound Contact Handle Time
- Cost per Inbound Contact
- Cost per Minute of Inbound Handle Time
- Technician Occupancy
- Average Speed of Answer

M e t r i c N e t

Productivity Metrics: Inbound Contacts per Tech per Month

Key Statistics	
Inbound Contacts per Technician per Month	
High	910
Average -----	591
Median	574
Low	329
Company XYZ	910

Service Desk

MetricNet

Productivity Metrics: Technician Utilization

Definition

Technician Utilization is the average time that a Technician spends handling both inbound and outbound contacts per month, divided by the number of work hours in a given month. The calculation for Technician Utilization is shown on the next page.

Why it's Important

Technician Utilization is the single most important indicator of Technician productivity. It measures the percentage of time that the average Technician is in "work mode", and is independent of Contact Handle Time or call complexity.

Key Correlations

Technician Utilization is strongly correlated with the following metrics:

- Inbound Contacts per Technician per Month
- Cost per Inbound Contact
- Cost per Minute of Inbound Handle Time
- Technician Occupancy
- Average Speed of Answer

Technician Utilization Defined

Technician Utilization $=$ $\dfrac{\text{((Average number of inbound calls handled by an tech in a month) X (Average inbound handle time in minutes) + (Average number of outbound calls handled by an tech in a month) X (Average outbound handle time in minutes))}}{\text{(Average number of days worked in a month) X (Number of work hours in a day) X (60 minutes/hr)}}$

- Tech Utilization is a measure of actual time worked by techs in a month, divided by total time at work during the month
- It takes into account both inbound and outbound contacts handled by the techs
- But it does not make adjustments for sick days, holidays, training time, project time, or idle time

M e t r i c N e t

Example: Service Desk Technician Utilization

- Inbound Contacts per Technician per Month = 375

- Outbound Contacts per Technician per Month = 225

- Average Inbound Contact Handle Time = 10 minutes

- Average Outbound Contact Handle Time = 5 minutes

Technician Utilization $=$

$$\frac{\text{((Average number of inbound Contacts handled by a Technician in a month) X (Average inbound handle time in minutes) + (Average number of outbound Contacts handled by a Technician in a month) X (Average outbound handle time in minutes))}}{\text{(Average number of days worked in a month) X (Number of work hours in a day) X (60 minutes/hr)}}$$
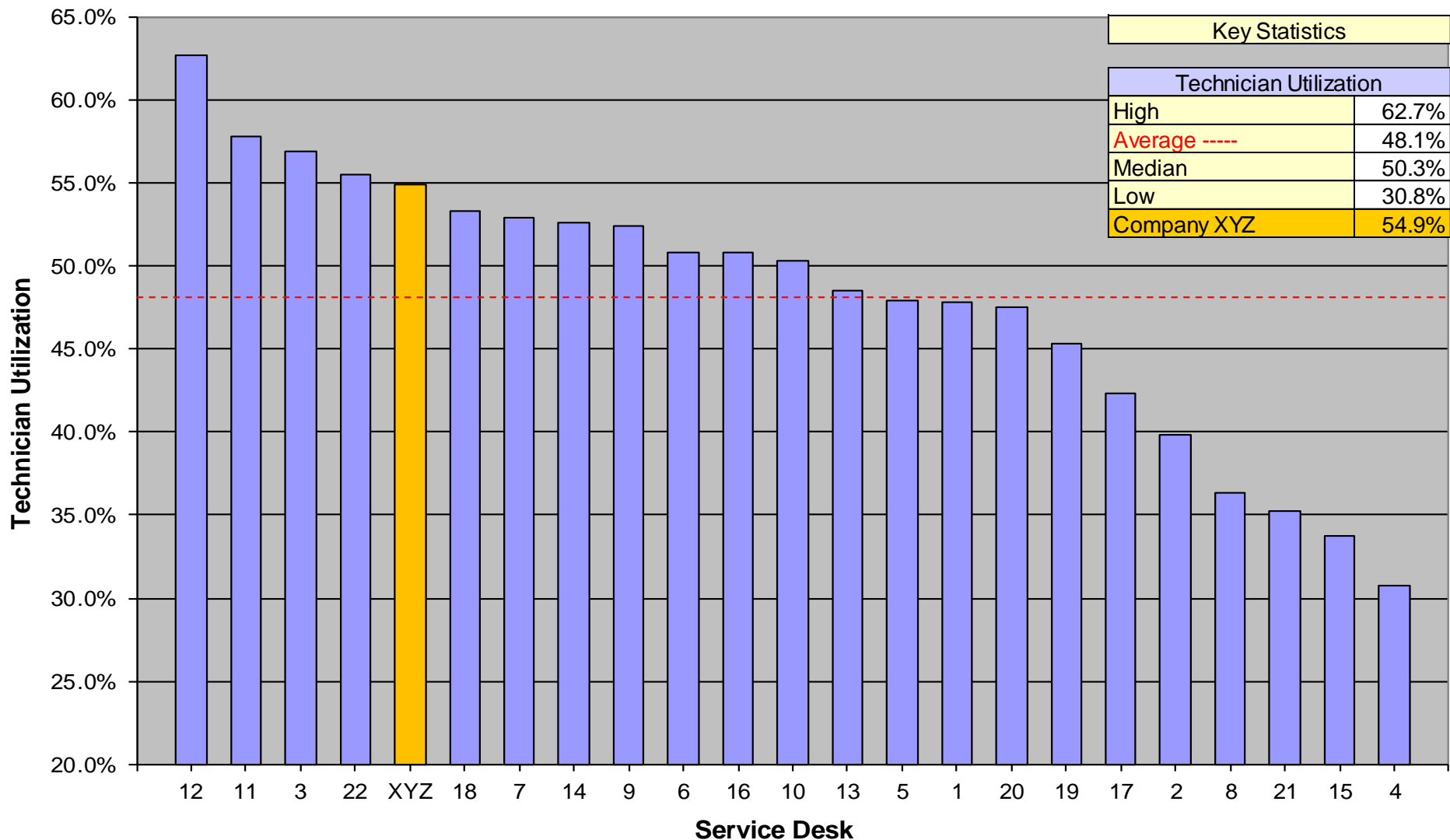
Technician Utilization $=$

$$\frac{\text{((375 Inbound Contacts per Month) X (10 minutes) + (225 Outbound Contacts per Month) X (5 minutes)}}{\text{(21.5 working days per month) X (7.5 work hours per day) X (60 minutes/hr)}}$$

$=$ **50.4%** Technician Utilization

Productivity Metrics: Technician Utilization

Key Statistics	
Technician Utilization	
High	62.7%
Average -----	48.1%
Median	50.3%
Low	30.8%
Company XYZ	54.9%

Technician Utilization (y-axis)

Service Desk (x-axis)

Service Desk order: 12, 11, 3, 22, XYZ, 18, 7, 14, 9, 6, 16, 10, 13, 5, 1, 20, 19, 17, 2, 8, 21, 15, 4

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Productivity Metrics: Technicians as a % of Total Headcount

Definition

This metric is the Full Time Equivalent Technician headcount divided by the total Service Desk headcount. It is expressed as a percentage, and represents the percentage of total Service Desk personnel who are engaged in direct customer service activities.

Why it's Important

The Technician headcount as a percent of total Service Desk headcount is an important measure of management and overhead efficiency. Since non-Technicians include both management and non-management personnel (e.g., supervisors and team leads, QA/QC, trainers, etc.), this metric is not a pure measure of management span of control. It is, however, a more useful metric than management span of control because the denominator of this ratio takes into account all personnel that are not directly engaged in customer service activities.
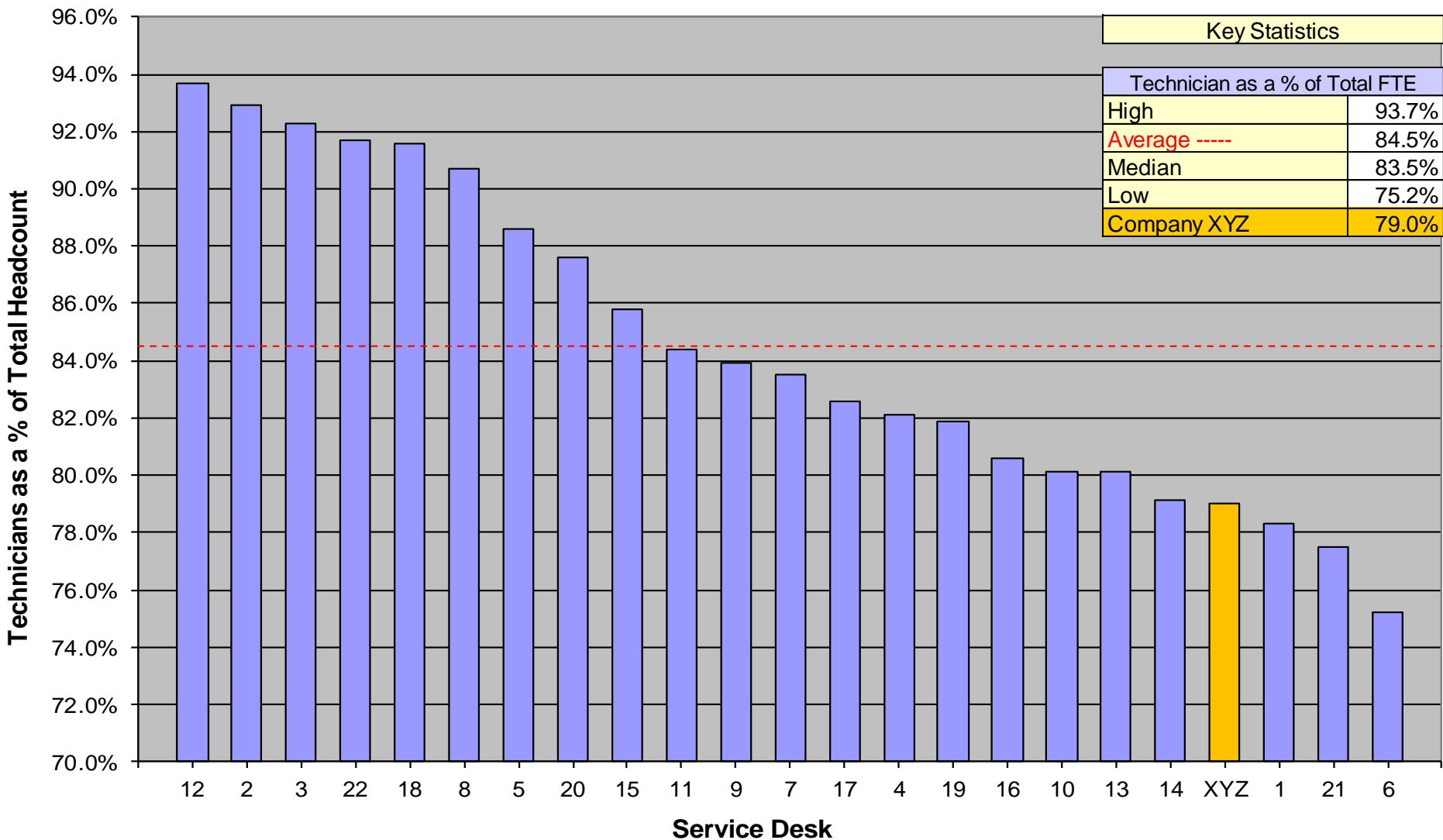
Key Correlations

Technicians as a % of Total Headcount is strongly correlated with the following metrics:

- Cost per Inbound Contact
- Cost per Minute of Inbound Handle Time

Productivity Metrics: Technicians as a % of Total Headcount

Key Statistics	
Technician as a % of Total FTE	
High	93.7%
Average -----	84.5%
Median	83.5%
Low	75.2%
Company XYZ	79.0%

MetricNet

Service Level Metrics

Company XYZ

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Service Level Metrics: Average Speed of Answer (ASA)

Definition

Average Speed of Answer is the total wait time that callers are in queue, divided by the number of calls handled. This includes both IVR-handled calls as well as calls handled by a live Technician. Most ACD systems provide this number.

Why it's Important

ASA is a common service level metric in the Service Desk industry. It is an indication of how responsive a Service Desk is to incoming calls. Since most Service Desks have an ASA service level target, the ASA is tracked to ensure service level compliance.
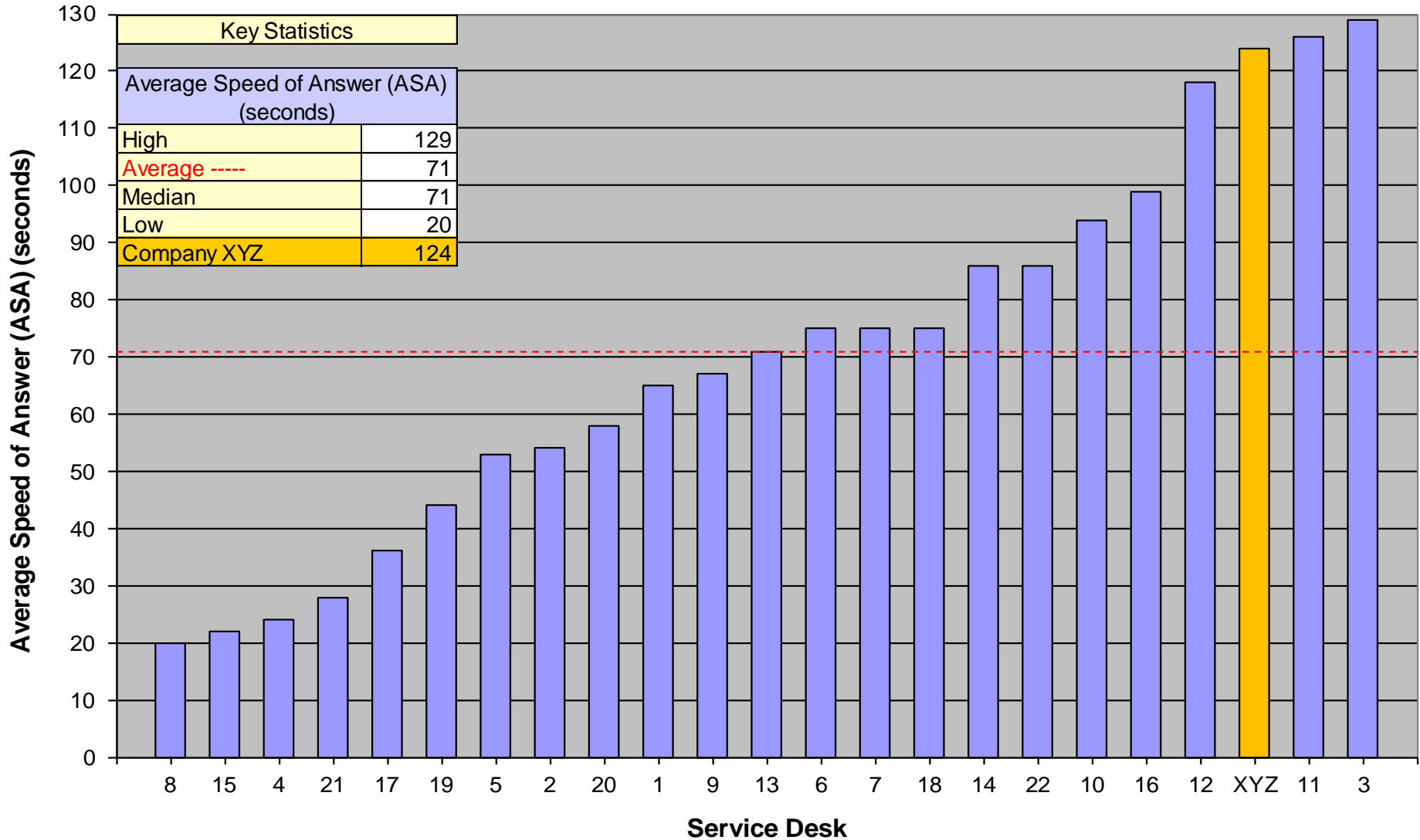
Key Correlations

Average Speed of Answer is strongly correlated with the following metrics:

- Call Abandonment Rate
- Percentage of Calls Answered in 30 Seconds
- Technician Utilization

Service Level Metrics: Average Speed of Answer

Key Statistics	
Average Speed of Answer (ASA) (seconds)	
High	129
Average -----	71
Median	71
Low	20
Company XYZ	124

Average Speed of Answer (ASA) (seconds) (y-axis)

Service Desk (x-axis): 8, 15, 4, 21, 17, 19, 5, 2, 20, 1, 9, 13, 6, 7, 18, 14, 22, 10, 16, 12, XYZ, 11, 3

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Service Level Metrics: % of Calls Answered in 30 Seconds

Definition

This metric is fairly self explanatory. It is the percentage of all incoming calls that are answered by a live Technician within 30 seconds. For those who don't track this exact metric, but track a similar metric such as % answered within 60 seconds, MetricNet uses a conversion formula to calculate the equivalent percentage of calls answered within 30 seconds.

Why it's Important

The percentage of calls answered within 30 seconds is a common service level metric in the industry. It is an indication of how responsive a Service Desk is to incoming calls. Many Service Desks have a service level target for the percentage of calls answered within 30 seconds, so the metric is tracked to ensure service level compliance.
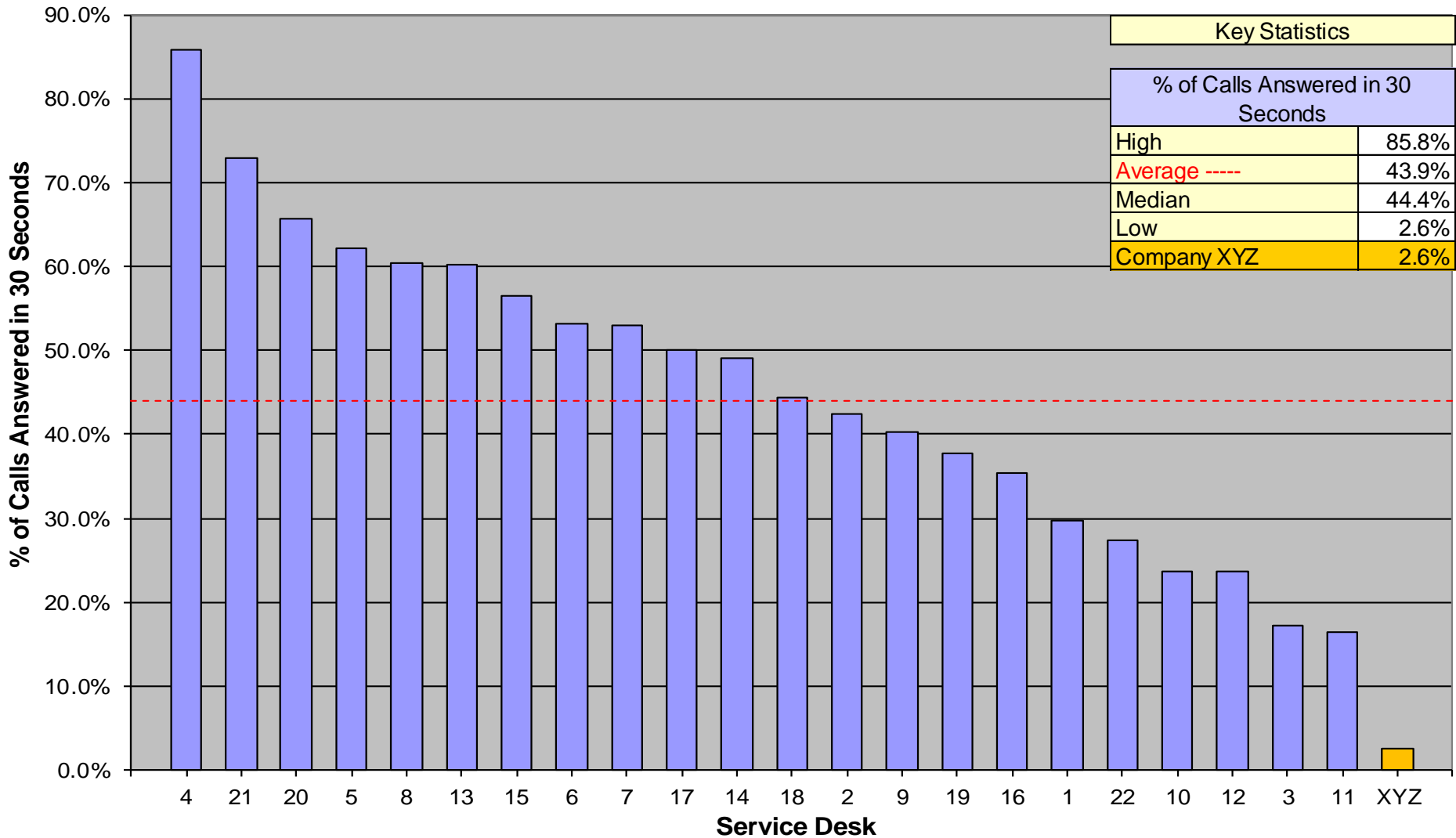
Key Correlations

The Percentage of Calls Answered Within 30 Seconds is strongly correlated with the following metrics:

- Average Speed of Answer
- Call Abandonment Rate
- Technician Utilization

Service Level Metrics: % of Calls Answered in 30 Seconds

Key Statistics	
% of Calls Answered in 30 Seconds	
High	85.8%
Average -----	43.9%
Median	44.4%
Low	2.6%
Company XYZ	2.6%

Service Level Metrics: Call Abandonment Rate

Definition

Call Abandonment Rate is the percentage of calls that were connected to the ACD, but were disconnected by the caller before reaching a Technician, or before completing a process within the IVR.

Why it's Important

Call abandonment rate is a common service level metric in the Service Desk industry. An abandoned call is an indication that a caller has given up, and hung up the phone before receiving service from a live Technician or from an IVR. Since most Service Desks have an abandonment rate service level target, the call abandonment rate is tracked to ensure service level compliance.
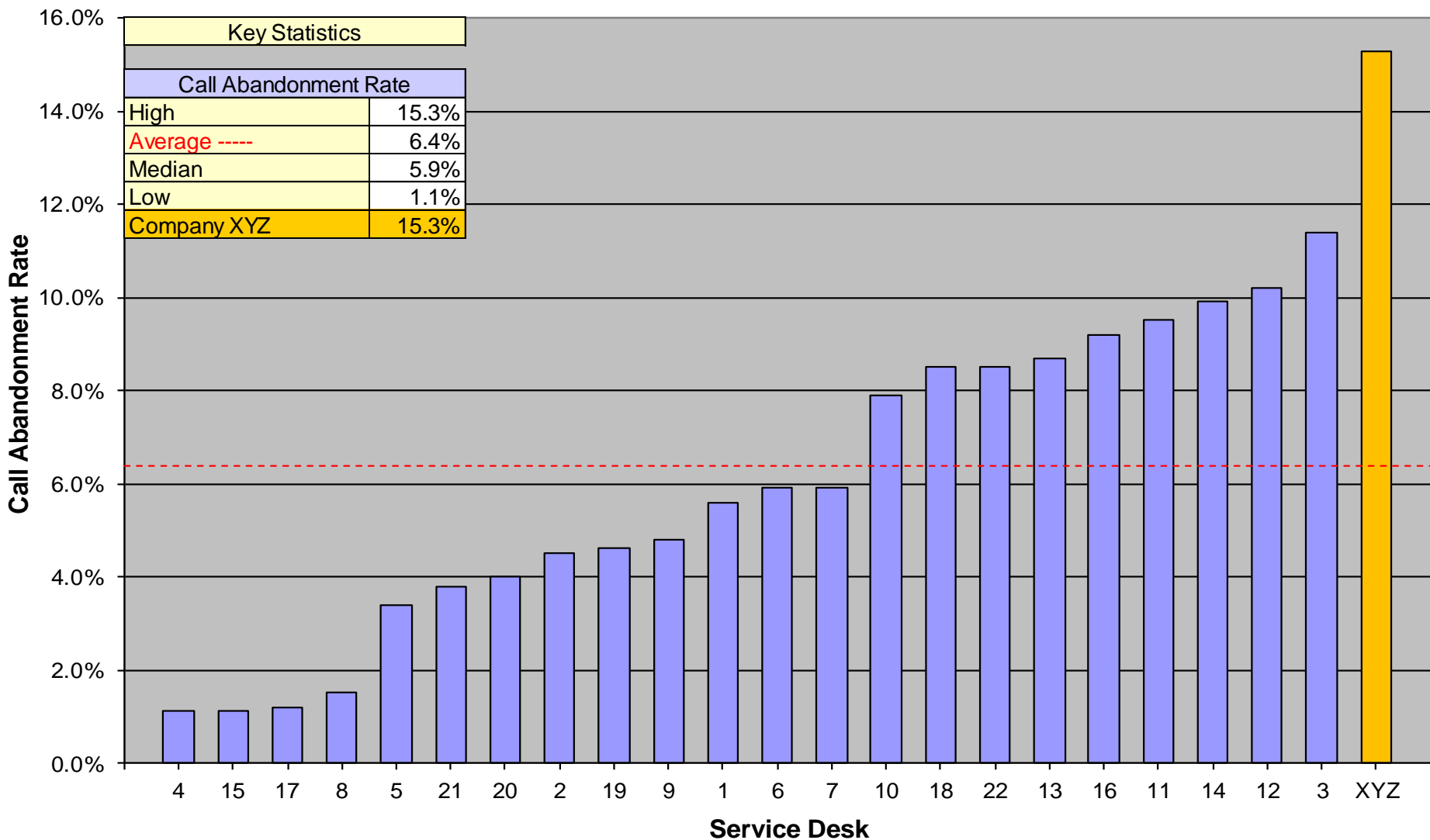
Key Correlations

Call Abandonment Rate is strongly correlated with the following metrics:

- Average Speed of Answer
- Percentage of Calls Answered in 30 Seconds
- Technician Utilization

Service Level Metrics: Call Abandonment Rate

Key Statistics	
Call Abandonment Rate	
High	15.3%
Average -----	6.4%
Median	5.9%
Low	1.1%
Company XYZ	15.3%

MetricNet

Quality Metrics

Company XYZ

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Quality Metrics: Call Quality

Definition

Although there is no consistent methodology for measuring Call Quality in the Service Desk industry, most Service Desks have developed their own scoring system for grading the quality of a call. Most will measure call quality on a scale of 0 to 100%, and include such things as Technician courtesy, professionalism, empathy, timeliness of resolution, quality of resolution, following the script, etc. in their Call Quality evaluations

Why it's Important

Call Quality is the cornerstone of Customer Satisfaction. Good Call Quality takes into account Technician knowledge and expertise, call efficiency (i.e. Call Handle Time), and Technician courtesy and professionalism. Unless Call Quality is consistently high, it is difficult to achieve consistently high levels of Customer Satisfaction. When measured properly, Call Quality and Customer Satisfaction should track fairly closely.
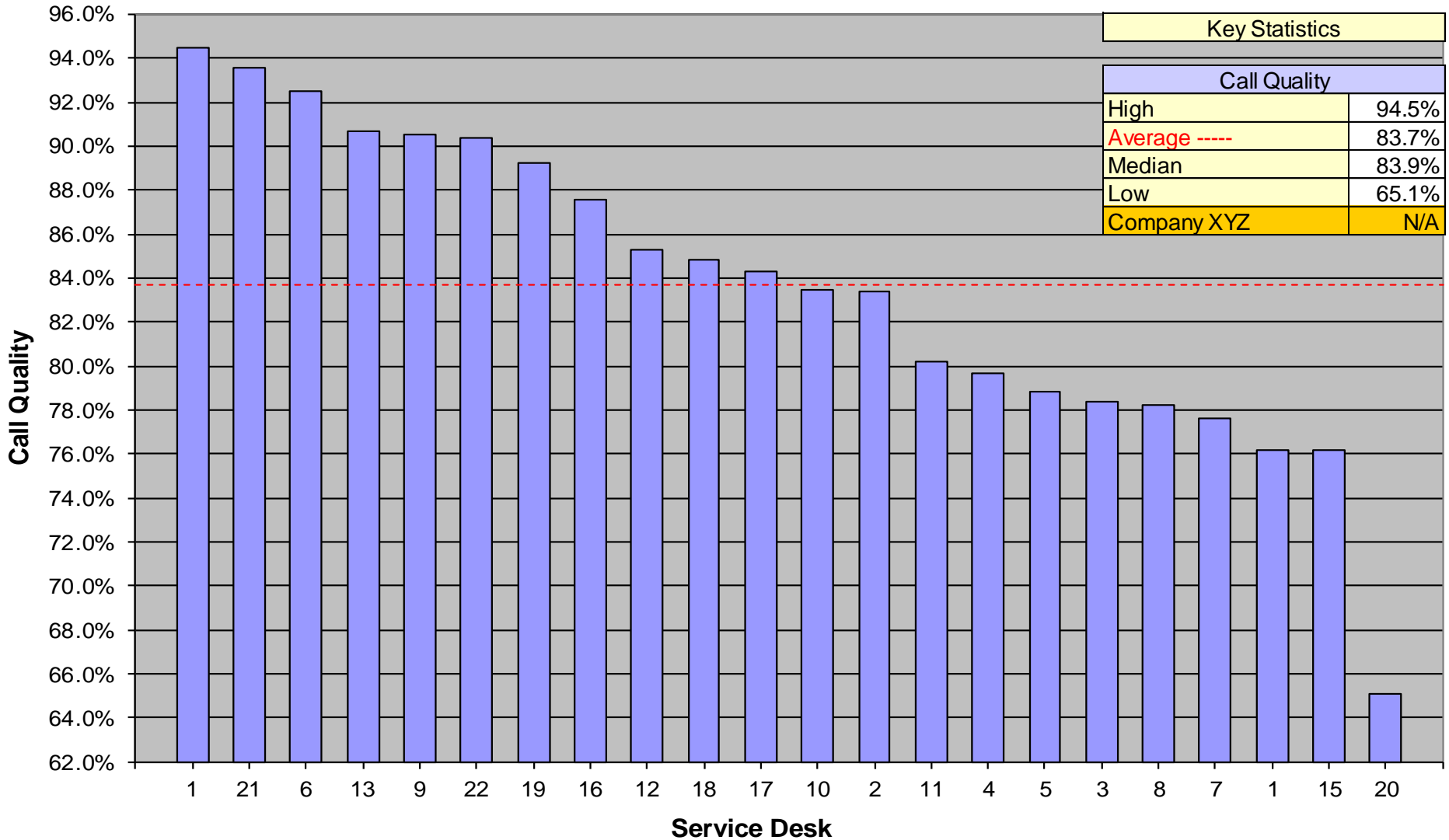
Key Correlations

Call Quality is strongly correlated with the following metrics:

- Customer Satisfaction
- First Contact Resolution Rate
- New Technician Training Hours
- Annual Technician Training Hours

Quality Metrics: Call Quality

Key Statistics	
Call Quality	
High	94.5%
Average -----	83.7%
Median	83.9%
Low	65.1%
Company XYZ	N/A

Call Quality (y-axis)

Service Desk (x-axis): 1, 21, 6, 13, 9, 22, 19, 16, 12, 18, 17, 10, 2, 11, 4, 5, 3, 8, 7, 1, 15, 20

MetricNet

Quality Metrics: First Contact Resolution Rate

Definition

First Contact Resolution applies only to live (telephone) contacts. It is the percentage of inbound calls that are resolved on the first interaction with the customer, divided by all calls that are potentially *resolvable* on first contact. Calls that cannot be resolved on first contact, such as a hardware break/fix, are not included in the denominator of First Contact Resolution Rate. Calls that require a customer callback, or are otherwise unresolved on the first contact for any reason, do not qualify for First Contact Resolution. For email contacts, some Service Desks consider an email resolved on first contact if the customer receives a resolution within one hour of submitting the email.

Why it's Important

First Contact Resolution is the single biggest driver of Customer Satisfaction. A high First Contact Resolution Rate is almost always associated with high levels of Customer Satisfaction. Service Desks that emphasize training (i.e., high training hours for new and veteran Technicians), and have good technology tools, such as remote diagnostic capability and knowledge management, generally enjoy a higher than average First Contact Resolution Rate.
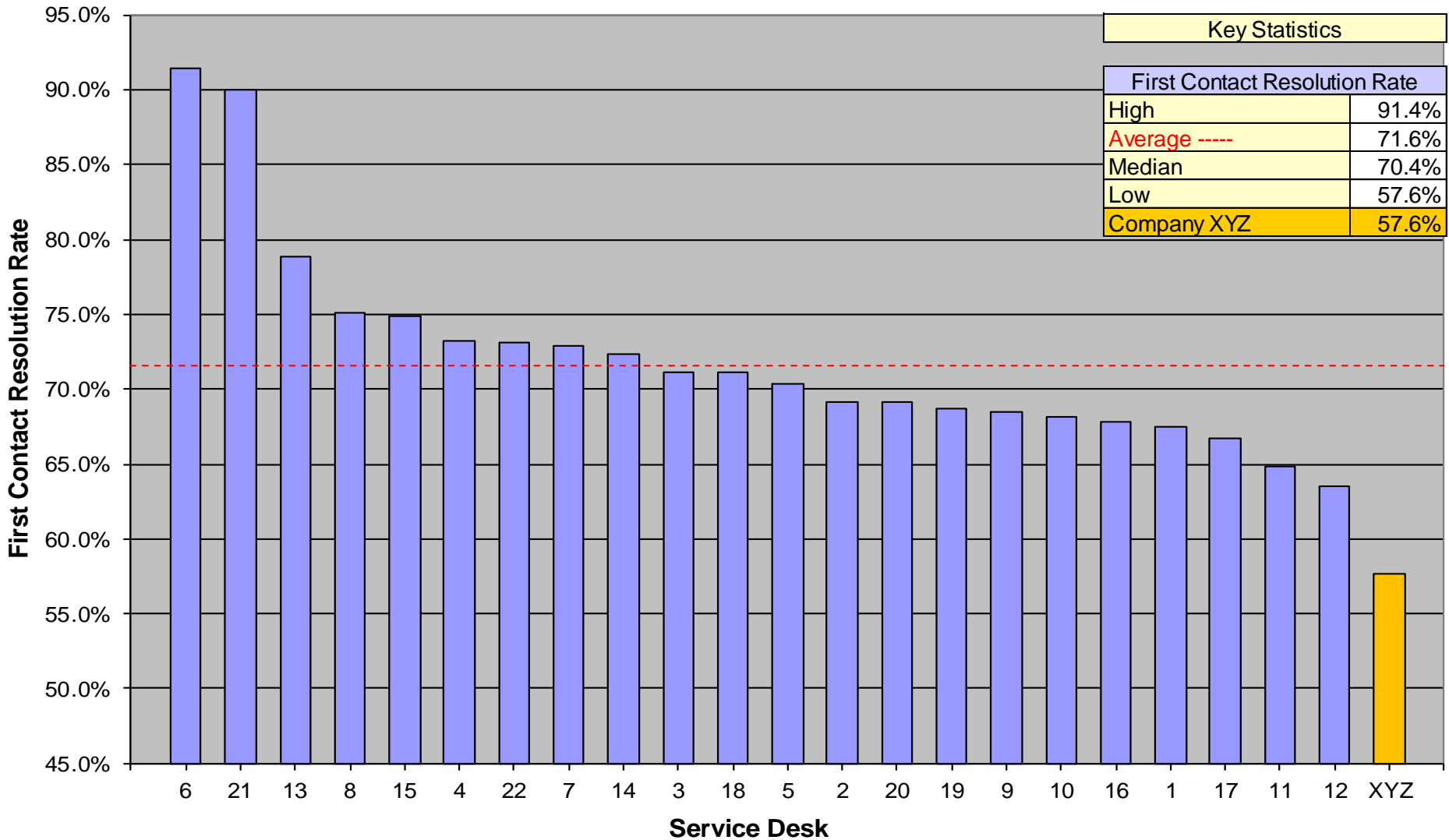
Key Correlations

First Contact Resolution is strongly correlated with the following metrics:

- Customer Satisfaction
- Net Level 1 Resolution Rate
- New Technician Training Hours
- Annual Technician Training Hours
- Inbound Contact Handle Time

Quality Metrics: First Contact Resolution Rate

Key Statistics	
First Contact Resolution Rate	
High	91.4%
Average -----	71.6%
Median	70.4%
Low	57.6%
Company XYZ	57.6%

Service Desk

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Quality Metrics: Customer Satisfaction

Definition

Customer Satisfaction is the percentage of customers who are either satisfied or very satisfied with their Service Desk experience. This metric can be captured in a numbers of ways including automatic after-call IVR surveys, follow-up outbound (live Technician) calls, Email surveys, postal surveys, etc.

Why it's Important

Customer Satisfaction is the single most important measure of Service Desk quality. Any successful Service Desk will have consistently high Customer Satisfaction ratings. Some Service Desk managers are under the impression that a low Cost per Inbound Contact may justify a lower level of Customer Satisfaction. But this is not true. MetricNet's research shows that even Service Desk's with a very low Cost per Inbound Contact can achieve consistently high Customer Satisfaction ratings.
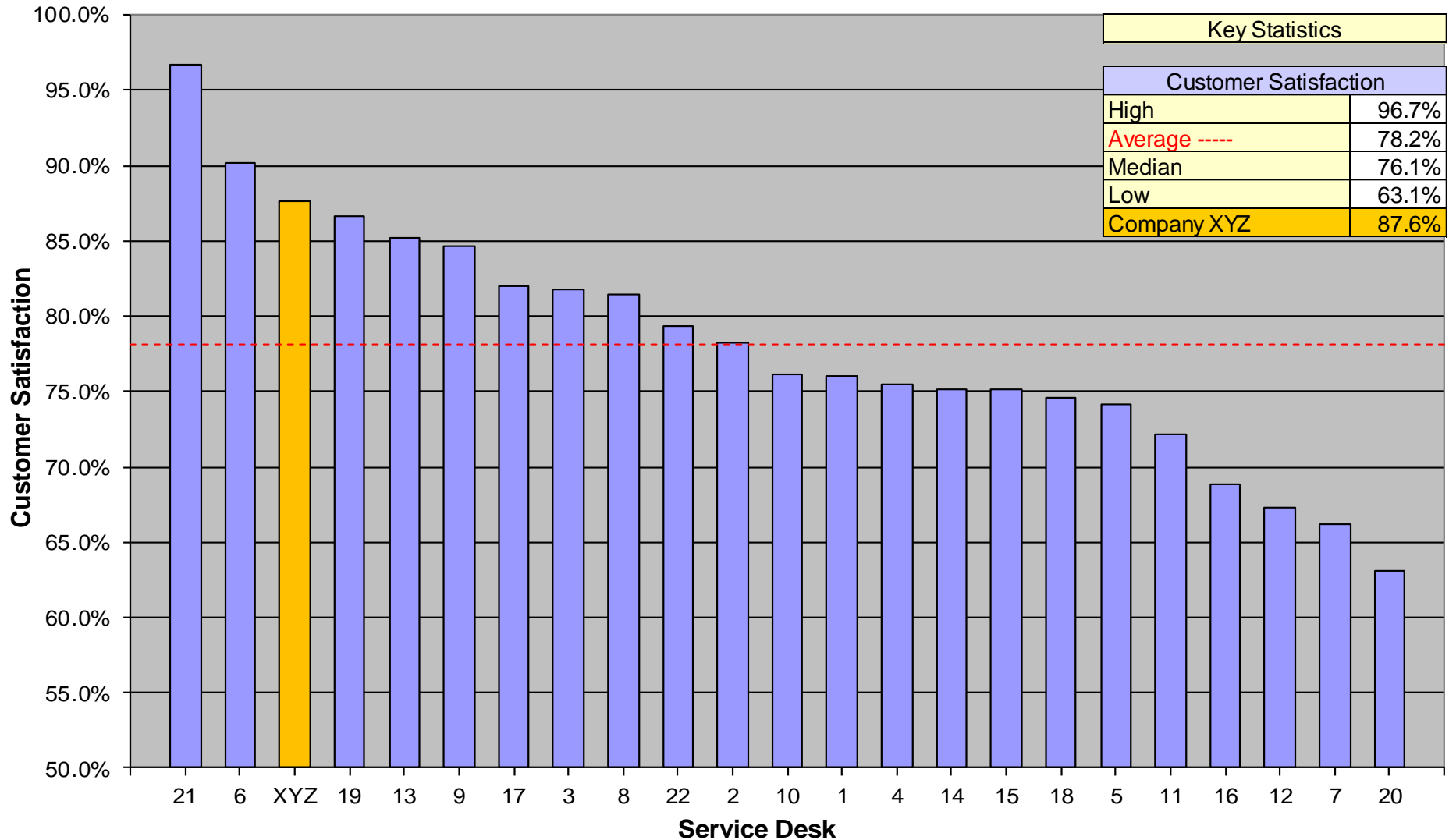
Key Correlations

Customer Satisfaction is strongly correlated with the following metrics:

- First Contact Resolution Rate
- Call Quality

Quality Metrics: Customer Satisfaction

Key Statistics	
Customer Satisfaction	
High	96.7%
Average -----	78.2%
Median	76.1%
Low	63.1%
Company XYZ	87.6%

Technician Metrics

Company XYZ

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Performance Benchmarking

Technician Metrics: Annual Technician Turnover

Definition

Annual Technician Turnover is the percentage of Technicians that leave the Service Desk, for any reason (voluntarily or involuntarily), on an annual basis.

Why it's Important

Technician turnover is costly. Each time a Technician leaves the Service Desk, a new Technician needs to be hired to replace the outgoing Technician. This results in costly recruiting, hiring, and training expenses. Additionally, it is typically several weeks or even months before a Technician is fully productive, so there is lost productivity associated with Technician turnover as well. High Technician turnover is generally associated with low Technician morale in a Service Desk.
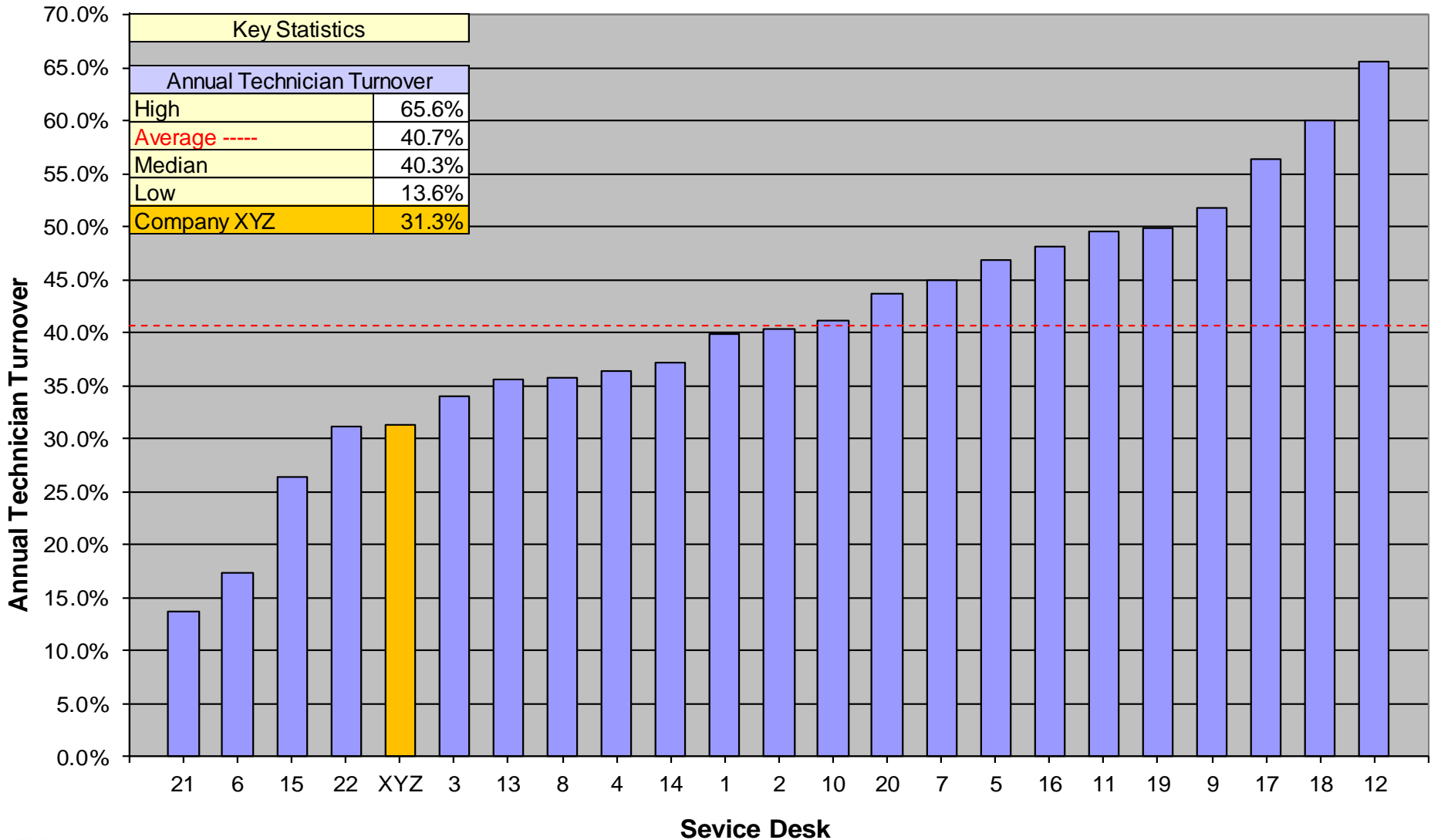
Key Correlations

Annual Technician Turnover is strongly correlated with the following metrics:
- Daily Technician Absenteeism
- Annual Technician Training Hours
- Customer Satisfaction
- Net First Contact Resolution Rate
- Cost per Inbound Contact
- Technician Job Satisfaction

Technician Metrics: Annual Technician Turnover

Key Statistics	
Annual Technician Turnover	
High	65.6%
Average -----	40.7%
Median	40.3%
Low	13.6%
Company XYZ	31.3%

Annual Technician Turnover (y-axis)

Sevice Desk (x-axis)

Service Desks: 21, 6, 15, 22, XYZ, 3, 13, 8, 4, 14, 1, 2, 10, 20, 7, 5, 16, 11, 19, 9, 17, 18, 12

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Technician Metrics: Daily Technician Absenteeism

Definition

Daily Technician Absenteeism is the average percentage of Technicians with an unexcused absence on any given day. It is calculated by dividing the number of absent Technicians by the total number of Technicians that are scheduled to be at work.

Why it's Important

High Technician Absenteeism is problematic because it makes it difficult for a Service Desk to schedule resources efficiently. High absenteeism can severely impact a Service Desk's operating performance, and increase the likelihood that service level targets will be missed. A Service Desk's ASA and Call Abandonment Rate typically suffer when absenteeism is high. Also, chronically high absenteeism is often a sign of low Technician morale.
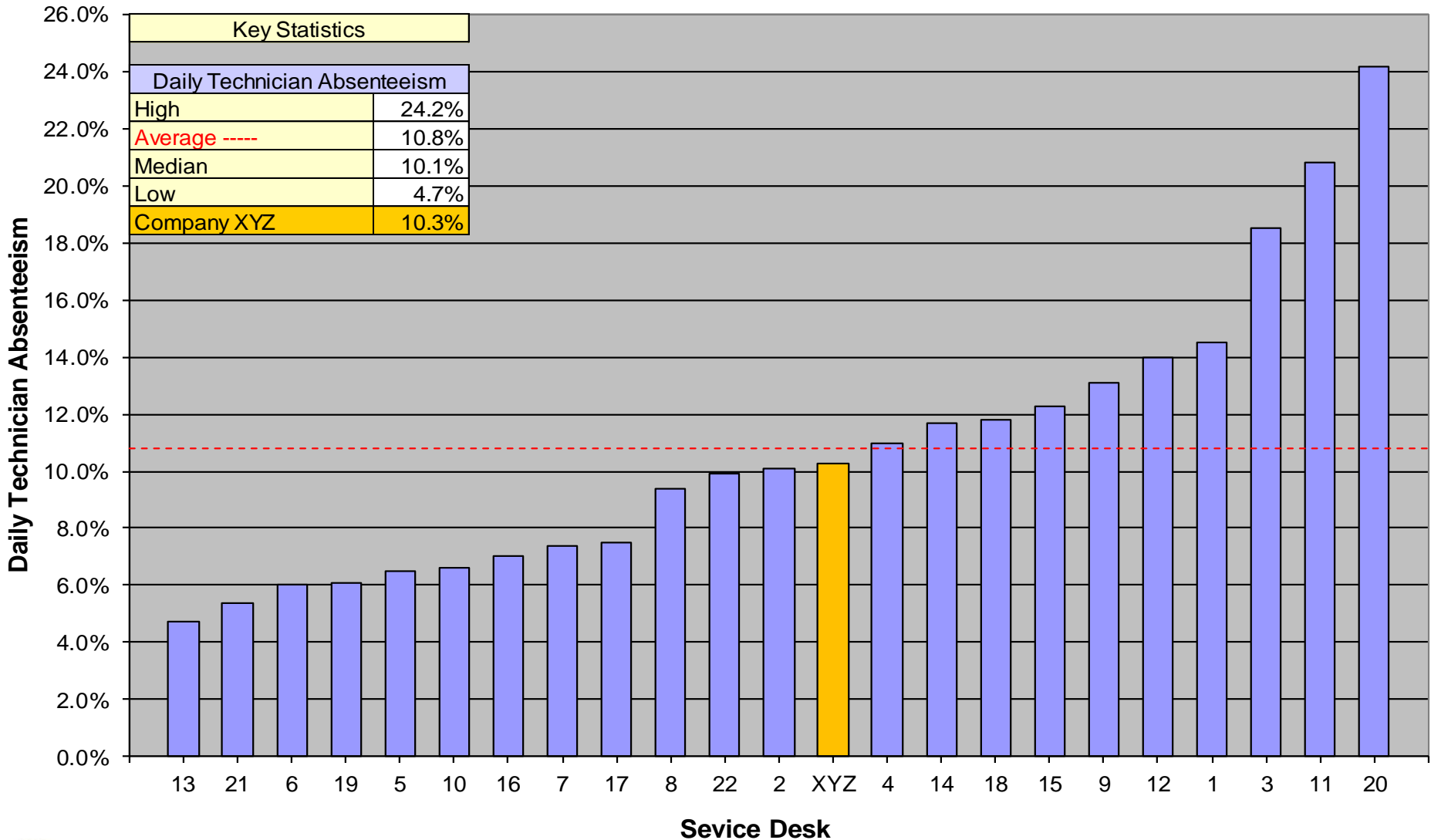
Key Correlations

Daily Technician Absenteeism is strongly correlated with the following metrics:

- Annual Technician Turnover
- Technician Job Satisfaction
- Technician Utilization
- Cost per Inbound Contact
- Contacts per Technician per Month

Technician Metrics: Daily Technician Absenteeism

Key Statistics	
Daily Technician Absenteeism	
High	24.2%
Average -----	10.8%
Median	10.1%
Low	4.7%
Company XYZ	10.3%

Daily Technician Absenteeism (Y-axis) vs. Service Desk (X-axis: 13, 21, 6, 19, 5, 10, 16, 7, 17, 8, 22, 2, XYZ, 4, 14, 18, 15, 9, 12, 1, 3, 11, 20)

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Technician Metrics: Technician Schedule Adherence

Definition

Technician Schedule Adherence is a measure of whether Technicians are in their seats ready to accept calls as scheduled. It measures how well a Service Desk's Technicians are "adhering" to the schedule. Technician Schedule Adherence is equal to the actual time that a Technician is logged in to the system ready to accept calls, divided by the total time the Technician is scheduled to be available to accept calls.

Why it's Important

Effective Technician scheduling is critical to achieving a Service Desk's service level goals and maximizing Technician Utilization. However, a work schedule, no matter how well constructed, is only as good as the adherence to the schedule. It is therefore important for Technicians to adhere to the schedule as closely as possible to ensure that these productivity and service level goals are met.
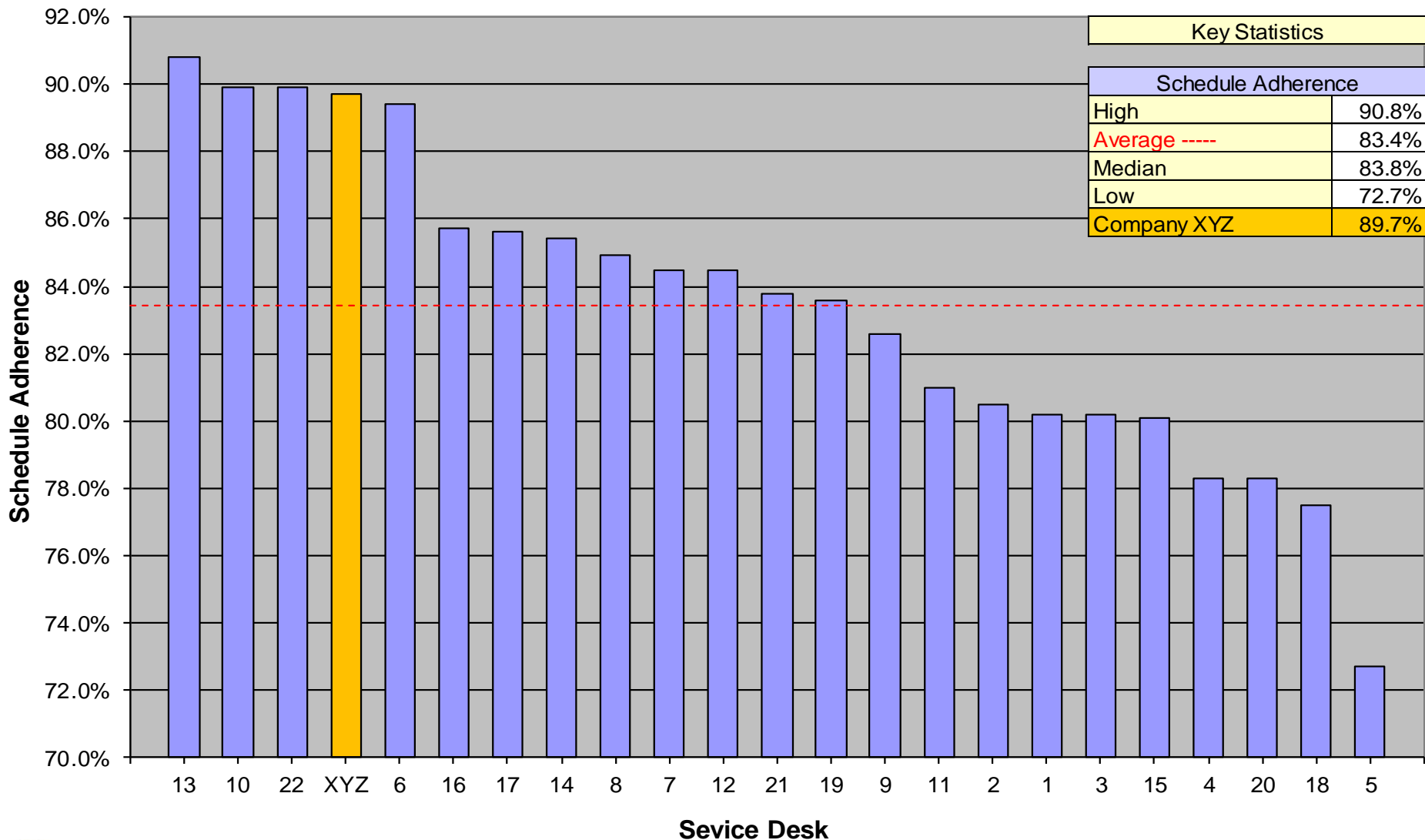
Key Correlations

Technician schedule adherence is strongly correlated with the following metrics:

- Technician Utilization
- Inbound Contacts per Technician per Month
- Technician Occupancy
- Average Speed of Answer

Technician Metrics: Technician Schedule Adherence

Key Statistics	
Schedule Adherence	
High	90.8%
Average -----	83.4%
Median	83.8%
Low	72.7%
Company XYZ	89.7%

Technician Metrics: New Technician Training Hours

Definition

The name of this metric is somewhat self explanatory.   New Technician Training Hours is the number of training hours (including classroom, CBT, self-study, shadowing, being coached, and OJT) that a new Technicians receives before he/she is allowed to handle customer contacts independently.

Why it's Important

New Technician Training Hours are strongly correlated with Call Quality and Net First Contact Resolution Rate. particularly during a Technician's first few months on the job. The more training a new Technician receives, the higher the Call Quality and Net FCR will typically be. This, in turn, has a positive effect on many other performance metrics including Customer Satisfaction. Perhaps most importantly, training levels have a strong impact on Technician morale: Technicians who receive more training typically have higher levels of job satisfaction.
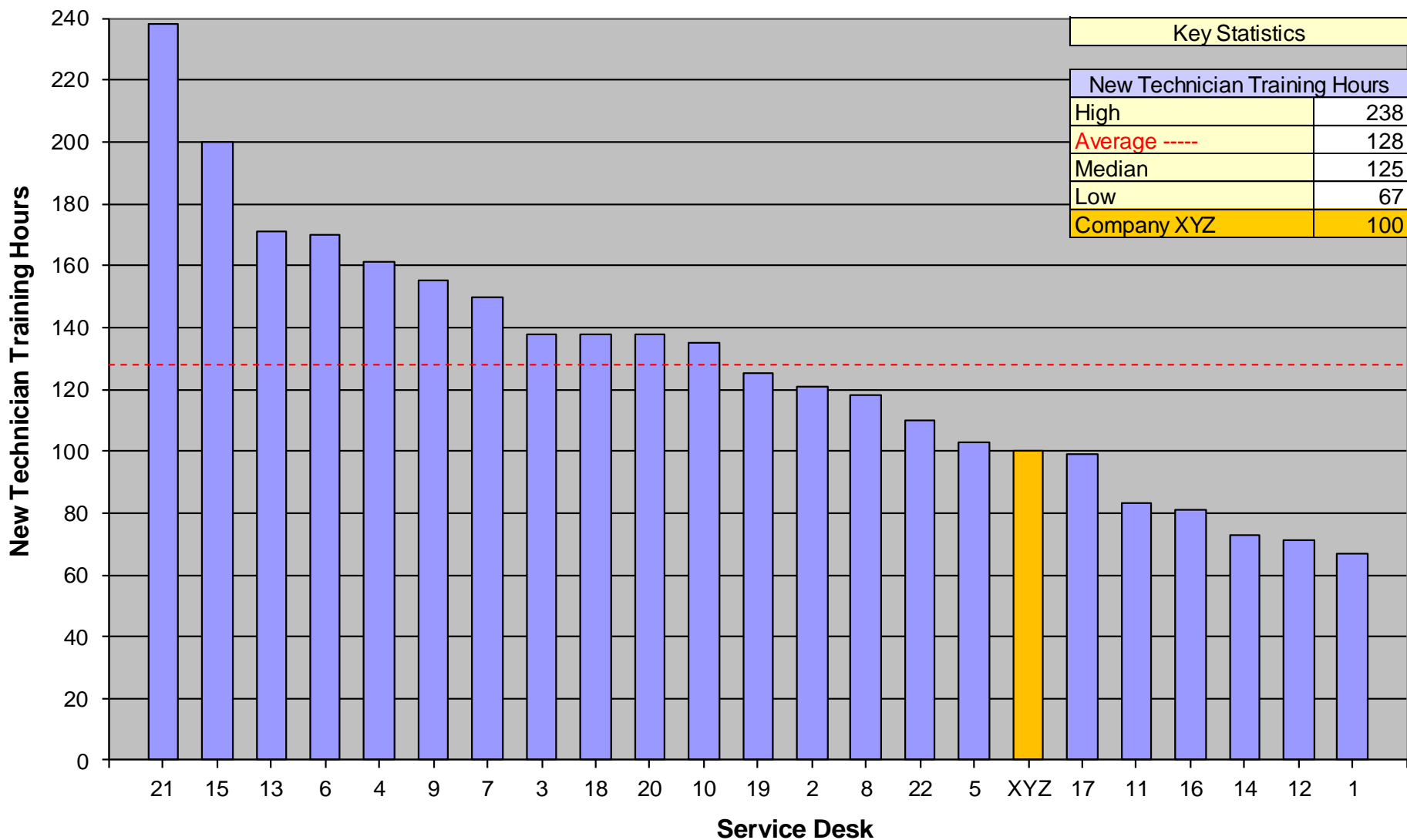
Key Correlations

New Technician Training Hours are strongly correlated with the following metrics:

- Call Quality
- Net First Contact Resolution Rate
- Customer Satisfaction
- Inbound Contact Handle Time
- Technician Job Satisfaction

MetricNet

Technician Metrics: New Technician Training Hours

Key Statistics	
New Technician Training Hours	
High	238
Average -----	128
Median	125
Low	67
Company XYZ	100

MetricNet

Technician Metrics: Annual Technician Training Hours

Definition

Annual Technician Training Hours is the average number of training hours (including classroom, CBT, self-study, shadowing, etc.) that a Technician receives on an annual basis. This number includes any training hours that a Technician receives that are not part of the Technician's initial (new Technician) training, but it does not include routine team meetings, shift handoffs, or other activities that do not involve formal training.

Why it's Important

Annual Technician Training Hours are strongly correlated with Call Quality, Customer Satisfaction, and Net First Contact Resolution Rate. Perhaps most importantly, training levels have a strong impact on Technician morale: Technicians who train more typically have higher levels of job satisfaction.
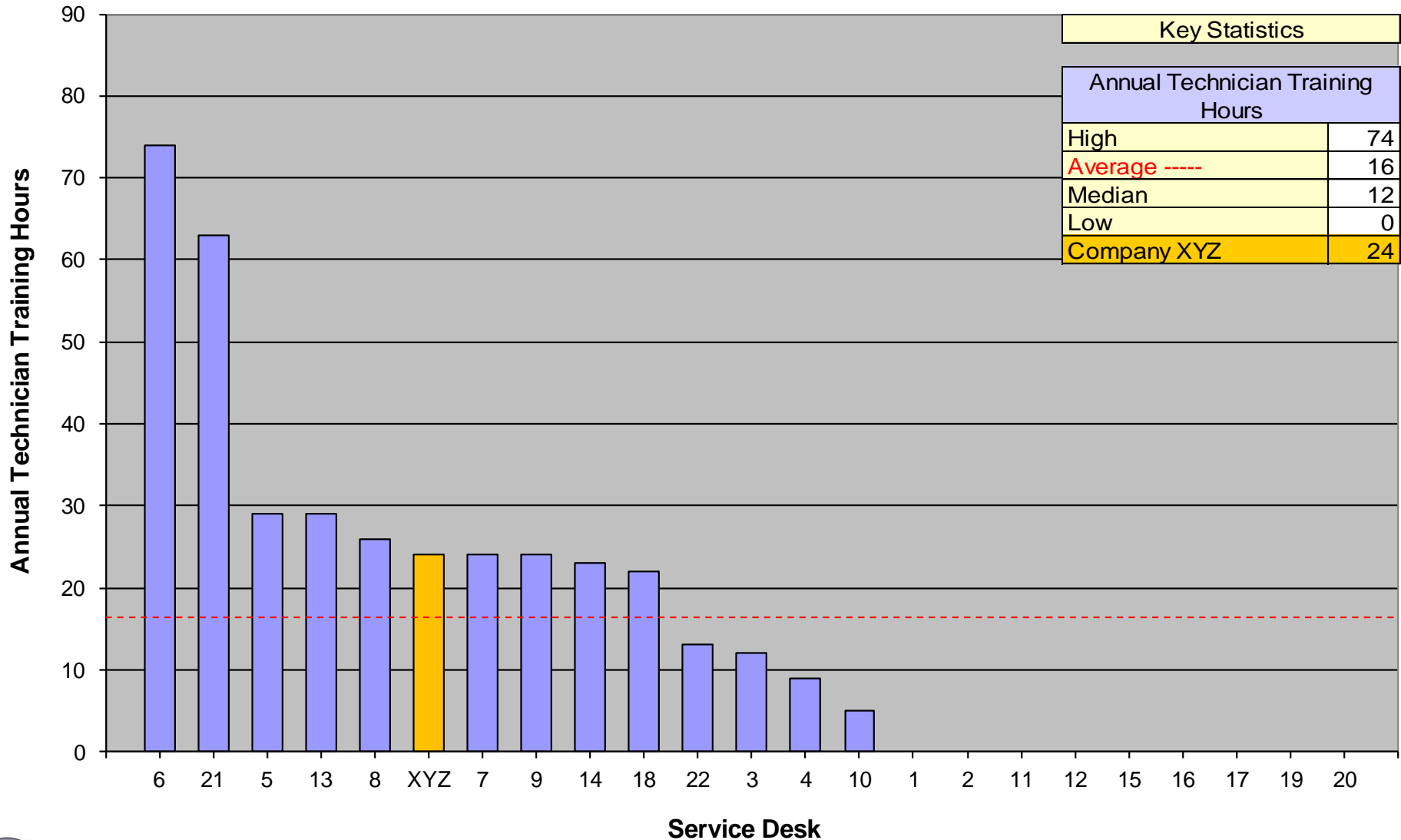
Key Correlations

Annual Technician Training Hours are strongly correlated with the following metrics:

- Call Quality
- Net First Contact Resolution Rate
- Customer Satisfaction
- Inbound Contact Handle Time
- Technician Job Satisfaction

Technician Metrics: Annual Technician Training Hours

Key Statistics	
Annual Technician Training Hours	
High	74
Average -----	16
Median	12
Low	0
Company XYZ	24

Technician Metrics: Technician Tenure

Definition

Technician tenure is the average number of months that Technicians have worked on a particular Service Desk.

Why it's Important

Technician tenure is a measure of Technician experience. Virtually every metric related to Service Desk cost and quality is impacted by the level of experience the Technicians have.
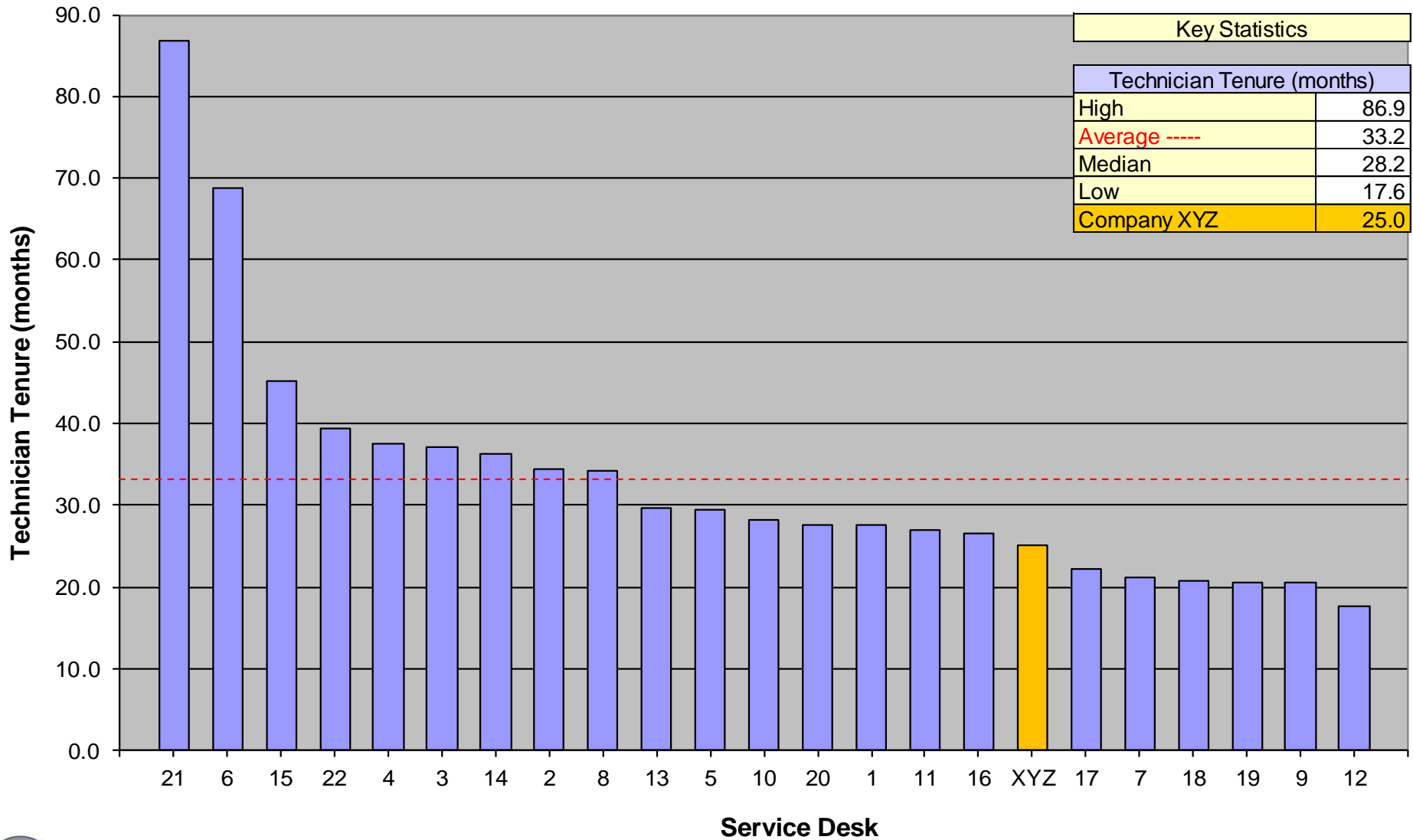
Key Correlations

Technician tenure is strongly correlated with the following metrics:

- Cost per Inbound Contact
- Call Quality
- Customer Satisfaction

- Annual Technician Turnover
- Training Hours
- Coaching Hours

- Inbound Contact Handle Time
- Net First Contact Resolution Rate
- Technician Job Satisfaction

Technician Metrics: Technician Tenure

Key Statistics	
Technician Tenure (months)	
High	86.9
Average -----	33.2
Median	28.2
Low	17.6
Company XYZ	25.0

Service Desk

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Technician Metrics: Technician Job Satisfaction

Definition

Technician Job Satisfaction is the percent of Technicians in a Service Desk that are either satisfied or very satisfied with their jobs.

Why it's Important

Technician Job Satisfaction is a proxy for Technician morale. And morale, while difficult to measure, is a bellwether metric that affects almost every other metric in the Service Desk. High performance Service Desks almost always have high levels of Technician Job Satisfaction. Perhaps more importantly, this metric can be controlled and improved through training, coaching, and career pathing.

Key Correlations

Technician Job Satisfaction is strongly correlated with the following metrics:

- Annual Technician Turnover
- Daily Technician Absenteeism
- Technician Training Hours
- Technician Coaching Hours

- Customer Satisfaction
- Net First Contact Resolution Rate
- Inbound Contact Handle Time
- Cost per Inbound Contact

Technician Metrics: Technician Job Satisfaction
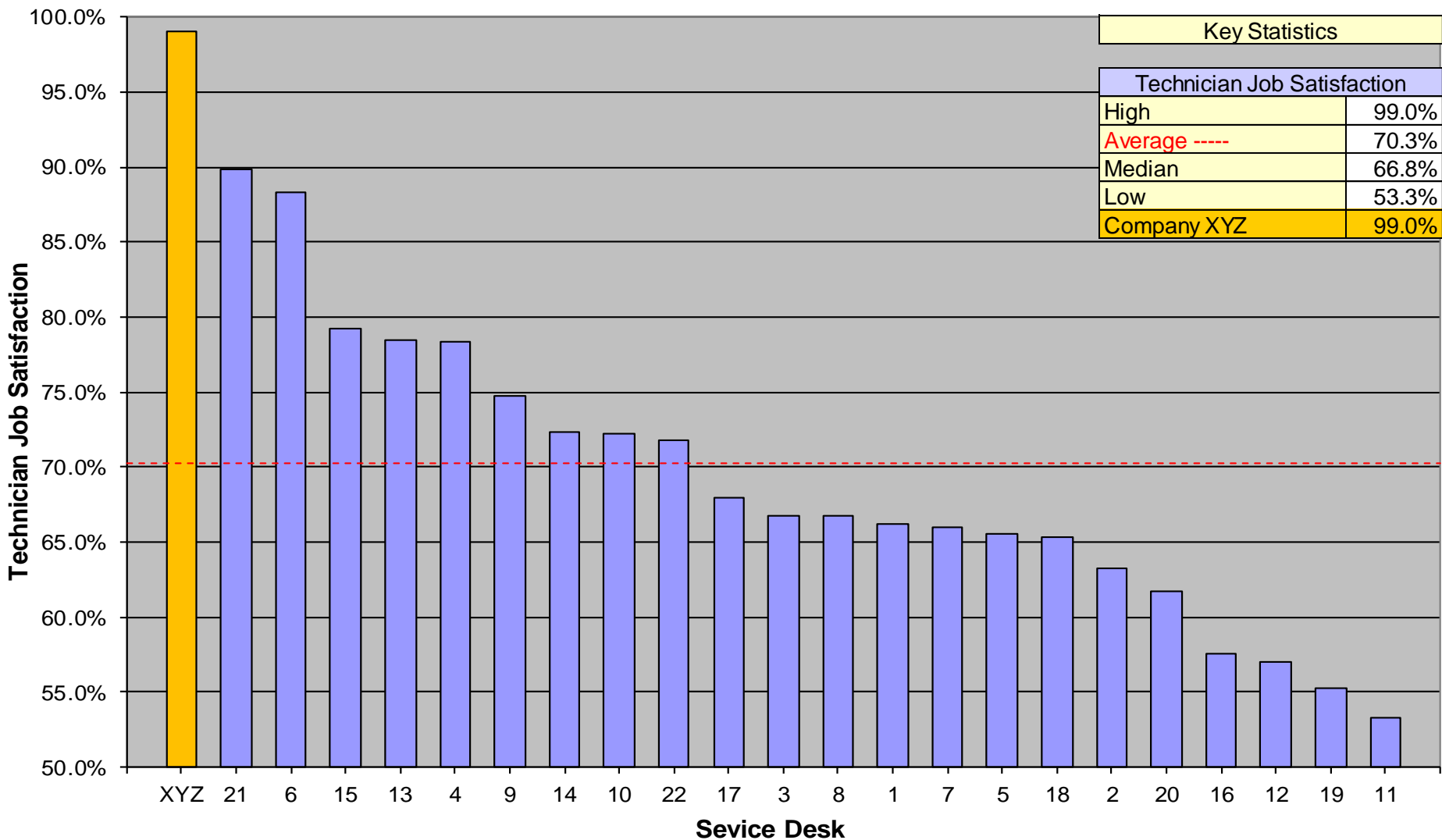
Key Statistics	
Technician Job Satisfaction	
High	99.0%
Average -----	70.3%
Median	66.8%
Low	53.3%
Company XYZ	99.0%

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Contact Handling Metrics

Company XYZ

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Contact Handling Metrics: Inbound Contact Handle Time

Definition

Inbound Contact Handle Time for a live (telephone) contact is the average time that a Technician spends on the contact, including Talk Time, wrap time, and After Call Work Time. For non-live contacts, such as Email, voice mail, and faxes, the Inbound Contact Handle Time is the average time that a Technician spends resolving the contact.

Why it's Important

A contact is the basic unit of work in a Call Center. Contact Handle Time, therefore, represents the amount of labor required to complete one unit of work.
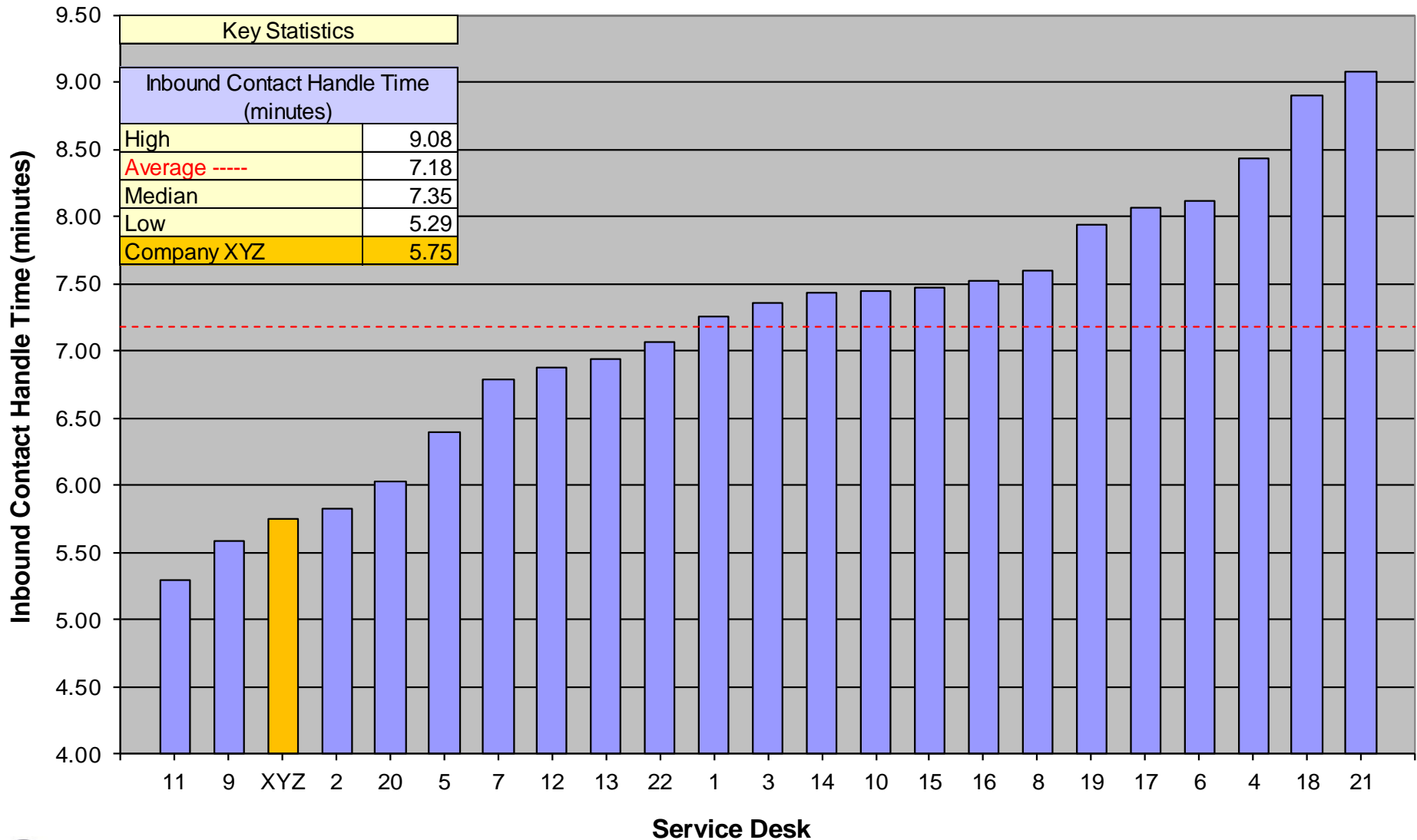
Key Correlations

Inbound Contact Handle Time is strongly correlated with the following metrics:

- Cost per Inbound Contact
- Inbound Contacts per Technician per Month
- Net First Contact Resolution Rate

Contact Handling Metrics: Inbound Contact Handle Time

Key Statistics	
Inbound Contact Handle Time (minutes)	
High	9.08
Average -----	7.18
Median	7.35
Low	5.29
Company XYZ	5.75

Service Desk order: 11, 9, XYZ, 2, 20, 5, 7, 12, 13, 22, 1, 3, 14, 10, 15, 16, 8, 19, 17, 6, 4, 18, 21

Contact Handling Metrics: User Self-Serve Completion Rate

Definition

The User Self-Serve Completion Rate is the percentage of incidents that are resolved by the user without the assistance of a live Technician. These could include contacts that are resolved within the IVR (e.g., automated password resets), and incidents that are resolved by the user through a self-help portal. A user who opts out of the IVR or self-help session to speak with a live Technician does not count as User Self-Serve because the user did not obtain a resolution for their issue before speaking with a live Technician.

Why it's Important

The Cost per Contact for self-serve contacts is significantly lower than it is for Technician assisted calls. By increasing the number of contacts resolved through Self-Serve, the average Cost per Inbound Contact can be reduced significantly. Many Service Desks, recognizing the potential to reduce their costs, constantly strive to increase their Self-Serve Completion Rates.
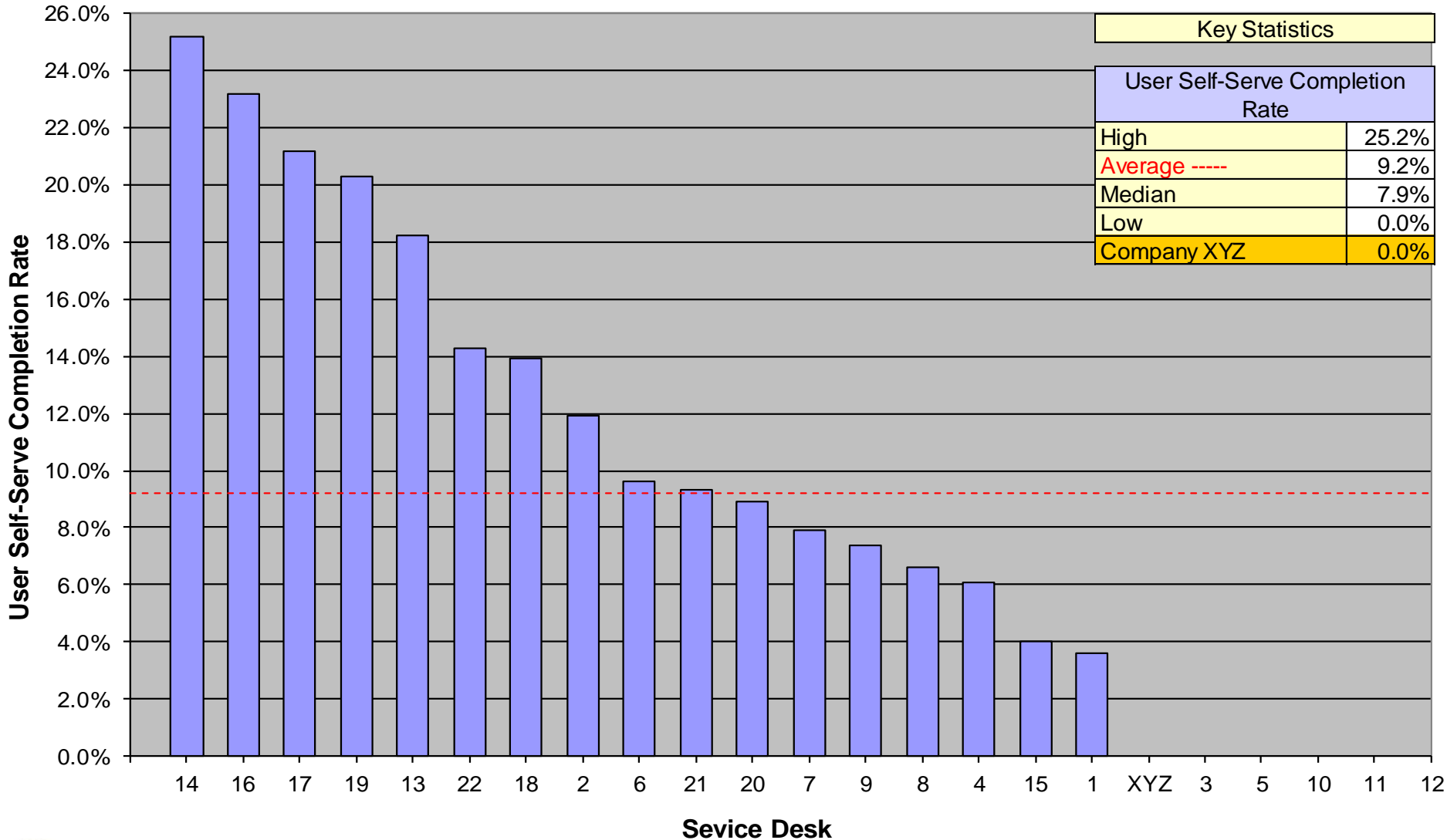
Key Correlations

User Self-Serve Completion Rate is strongly correlated with the following metrics:

- Cost per Inbound Contact

Contact Handling Metrics: User Self-Serve Completion Rate

Key Statistics	
User Self-Serve Completion Rate	
High	25.2%
Average -----	9.2%
Median	7.9%
Low	0.0%
Company XYZ	0.0%

MetricNet

About MetricNet:

Your Benchmarking Partner

Company XYZ

MetricNet
Performance Benchmarking

Benchmarking is MetricNet's Core Business

Information Technology	■ Service Desk
	■ Desktop Support
	■ Field Services

Call Centers	■ Technical Support
	■ Customer Service
	■ Telemarketing/Telesales
	■ Collections

| **Telecom** | ■ Price Benchmarking |

| **Satisfaction** | ■ Customer Satisfaction |
| | ■ Employee Satisfaction |

25 Years of Service Desk Data

More than 2,400 Service Desk Benchmarks

Global Database

30 Key Performance Indicators

Nearly 80 Industry Best Practices

Summary of Included Benchmarking Metrics

Cost

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

Quality

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

Productivity

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

Tech

- ❑ Annual Technician Turnover
- ❑ Daily Technician Absenteeism
- ❑ Schedule Adherence
- ❑ New Technician Training Hours
- ❑ Annual Technician Training Hours
- ❑ Technician Tenure
- ❑ Technician Job Satisfaction

Service Level

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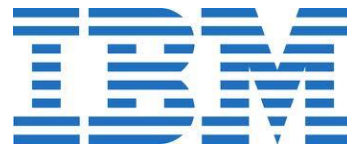- ❑ Call Abandonment Rate

Call Handling

- ❑ Inbound Contact Handle Time
- ❑ User Self-Service Completion Rate

M e t r i c N e t

Meet a Sampling of Our Clients

MetricNet Conducts benchmarking for Service Desks worldwide, and across virtually every industry sector.

Your Project Manager: Jeff Rumburg

Jeff Rumburg is a co-founder and Managing Partner at MetricNet, LLC. Jeff is responsible for global strategy, product development, and financial operations for the company. As a leading expert in benchmarking and re-engineering, Mr. Rumburg authored a best selling book on benchmarking, and has been retained as a benchmarking expert by such well-known companies as American Express, Hewlett-Packard, and GM. Prior to co-founding MetricNet, Mr. Rumburg was president and founder of The Verity Group, an international management consulting firm specializing in IT benchmarking. While at Verity, Mr. Rumburg launched a number of syndicated benchmarking services that provided low cost benchmarks to more than 1,000 corporations worldwide.

Mr. Rumburg has also held a number of executive positions at META Group, and Gartner, Inc. As a vice president at Gartner, Mr. Rumburg led a project team that reengineered Gartner's global benchmarking product suite. And as vice president at META Group, Mr. Rumburg's career was focused on business and product development for IT benchmarking. Mr. Rumburg's education includes an M.B.A. from the Harvard Business School, an M.S. magna cum laude in Operations Research from Stanford University, and a B.S. magna cum laude in Mechanical Engineering. He is author of *A Hands-On Guide to Competitive Benchmarking: The Path to Continuous Quality and Productivity Improvement*, and has taught graduate-level engineering and business courses. Mr. Rumburg serves on the Strategic Advisory Board for HDI, formerly the Help Desk Institute.
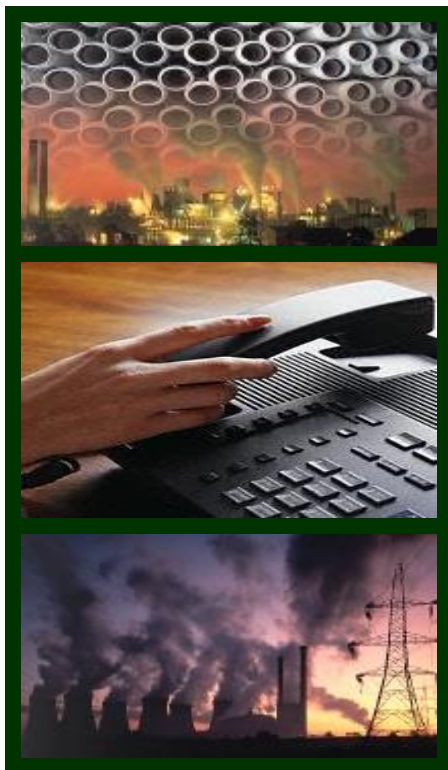
Thank You!

We look forward to serving you!