Metrics For The Service Desk

About the Author

The author of this report is SDI's Industry Analyst Scarlett Bayes. Scarlett is dedicated to providing insightful and practical research to the service desk industry through investigating trends, analysing data and engaging with the IT service community. You can find more of Scarlett's work on the SDI blog and can follow her on Twitter @SDIScarlett

The creation of this report was supported by Matt Greening, SDI's Head of Service Transformation

While every care has been taken to ensure the accuracy of this report, the results, estimates and opinions stated are based on sources which, while we believe them to be reliable, are not guaranteed. No liability can be accepted by SDI, its Directors or Employees for any loss to any person acting or failing to act as a result of anything contained in or omitted from this report, or conclusions stated.

Contents

Zendesk Introduction

Introduction

IT has transformed the modern workplace. Automation and technology are driving huge productivity gains across the enterprise. As the pace of change accelerates, the workforce increasingly expects solutions that are fast and easy to use. While the gains are real, IT struggles to manage complexity behind-the-scenes while simplifying life for employees.

As the primary point of interaction between IT and the business, your IT service management system sets the tone for the relationship between you and your customers. That system needs to make it easy for the customer to get help. At the same time, it must enable complex behind the-curtain processes and technology integrations that the rest of the business doesn't see. And it needs to be flexible enough to keep up with the needs of both IT and the business.

Where metrics come in

We've all heard the phrase, "an ounce of prevention is worth a pound of cure." When it comes to your help desk and your customers' experience, this is so true. Some very simple reporting and analytics can show you what you need to do to help ensure your customers are happy. These can help you anticipate if things are going badly before they actually get bad. But in the world of IT support, the number of metrics you can pay attention to are roughly 10 billion, give or take a few. Focusing on everything from team performance, issue resolution, average handle time, and more, it can be difficult to know what you should be tracking and what you don't need to measure. That's where this report can help.

Introduction

Metrics can be the key to service improvement, but service desks may not know which metrics are the most useful to measure, or what to do with them once they are measured. Furthermore, metrics are a way of measuring changes in service, and on the service desk there are particular aspects of this that are valuable to monitor. For example, a typical service desk should measure factors such as efficiency, performance, progress, and quality, which will ultimately allow you to monitor the improvement in the processes of service.

There is a risk in measuring metrics on a daily or weekly basis that it becomes time consuming and loses value, as you could spend more time measuring than implementing improvements. Certain areas should be monitored on a daily and weekly basis where appropriate, whereas other are better suited to be measured quarterly or annually. Finding a balance that suits your service desk is key to succeeding with metrics. A key starting point would be to ask what do your customers want? If, for example, your customers want to see this data on a daily basis, you will need to find a way of producing that efficiently. However, if your customers are not interested, then producing reports too frequently wastes time and resources.

Understanding your Customer

Understanding the needs of your customer can help you in deciding what metrics to measure. Typically, customers want access to the technology they need to do their job, and they want it to work. If it is not available or something goes wrong, they want to be able to contact someone who can provide access or a fix as soon as possible. Something that is noteworthy is that the preferred communication channel can differ from person to person; some customers want to be able to pick up the phone and speak to someone immediately, whereas others want to be able to communicate by email or through a portal, then move on and do something else while they are waiting for that thing to be fixed or delivered. Providing a responsive service means ensuring any channel to the service desk is available, and that customers are able to get hold of someone in their preferred method as soon as possible. Ideally, they would want that person to fix it immediately. Most customers accept that this is not always possible but want to be kept up to date with the progress of the ticket. They also expect it to be fixed according to agreed timescales and to be informed when this happens. Largely, that is what your customers expect and this is what should define your service. Therefore, this should give you a base for understanding the type of metrics that measure the entire customer experience.

Deciding what metrics to measure

Before you decide what metrics you should be measuring, you must decide what kind of service you want to provide, how it aligns with the organisation's strategy, your team's vision and mission statements, what the business is interested in, what your customers think is important, and any service level agreement (SLA) commitments. From this, you should be able to build a set of 4 or 5 Critical Success Factors (CSFs), to be able to monitor as wide of a scope of your service as possible. From this, you should create a number of Key Performance Indicators (KPIs) to measure how the service desk is performing against those CSFs.

The issue with metrics linked to SLA targets is that they can cause service desk managers to focus on individual metrics rather than analyse them in conjunction with each other to understand the bigger picture. It can also stifle creativity and innovation when the priority is to maintain acceptable, but not exceptional, service levels. Red Amber Green (RAG) statuses are an effective method to visually represent whether the service desk is meeting SLA target. However, while a target may appear to be being met, but the customer experience, and a deeper look into the metric, will tell a different story; this is known as a Watermelon effect.

Rather than focusing on specific metrics, it can be more beneficial to have a set of metrics that covers the whole of the service. This allows for better assessment of performance over a wider range of services, and provides a solid base for monitoring improvement. This can be particularly valuable when implementing an improvement or change, as a blend of metrics will allow you to observe how this affects other areas of service.

Some key areas to focus your CSFs on should centre on are responsiveness, quality of communication, effective resolution performance, employee satisfaction, and customer perception. Let us look at these individually:

Responsiveness

KPIs that fall under this area would involve measuring metrics based on how quickly your analysts acknowledge and respond to incidents and service requests across supported communication channels. However, this is where the blend of metrics becomes important. For example, if a service desk manager wants to improve response rates, this may have an impact on first contact resolution and, ultimately, SLA performance, as analysts will be trying to increase their availability by reducing call duration, doing less diagnostic work, and escalating minor issues unnecessarily. Therefore, it is necessary to have a CSF surrounding the quality of the communication between your customers and the analysts, and the analysts and the rest of the service operation.

Quality of Communication

KPIs within this area should be based around questions such as: Do tickets have the right information? Are calls being handled in an effective and efficient manner? Are your analysts displaying excellent customer service? Analyst will need to understand what is expected of them and how this will be monitored and measured. Focusing on quality can benefit the customer experience, as well as improve the efficiency of the service desk. However, ensuring that analysts are utilising excellent customer service skills and are handling calls efficiently does not ensure that calls are being resolved effectively. For this, CSFs surrounding effective resolution performance are necessary to measure.

Deciding what metrics to measure

Effective Resolution Performance

KPIs in this category include first contact resolution/fulfilment, first level resolution/fulfilment, SLA performance and reopened tickets . Monitoring KPIs such as these will ensure that analysts are meeting SLA targets without unnecessarily escalating tickets or, conversely, spending too long on one solution. However, pressuring analysts to meet targets in several areas can be stressful, which emphasises the importance of monitoring employee satisfaction.

Employee Satisfaction

It is important to have a CSF around the happiness, satisfaction, or motivation of your internal team. If service desk staff are not happy with their work environment, other things will be affected by their mood. Therefore, a happy, motivated team will potentially be more effective in achieving and succeeding targets. To measure employee satisfaction, service desk managers could send out their own weekly survey for their direct staff with a simple question, such as "are you happy in your role?" or something similar, and allow comments underneath. A single-question, weekly survey is useful indicator of the mood of the team, quickly showing the impact of any newly introduced service or major change. It is imperative to show your employees that any comments are listened to, potentially using them as discussion points in team meetings, and to put in place an improvement plan, if required. Furthermore, happy and satisfied employees can lead to a better customer experience and perception.

Customer Perception

Typically, customers are not particularly interested in an SLA target itself, but more that their needs and expectations are met. Therefore, setting SLA targets highlighting the best possible service for a proportion of customers can lead to a poor perception of the service desk. For example, if an SLA states that your service will answer 80% of calls within 30 seconds does not provide an 80% service to all customers. It will meet customer needs 80% of the time, with no specified response time for the remaining 20%. This can lead to a negative customer perception. This type of target can also affect the behaviour of analysts, particularly in the case of resolution times, where the focus is on preventing tickets from breaching SLA, ignoring those tickets that have already breached.

A solution to this would be to set SLA targets that encompass all customers; for example, 100% of calls answered in, say, 90 seconds. In this example, 80% of calls may still be answered in 30 seconds, but now there is a realistic expectation for the remaining 20% of customers.

Measuring customer satisfaction can be tricky, but one of the most effective ways to achieve this is through feedback surveys; specifically, event or periodic surveys. This process should also take into account complaints, comments, suggestions, and general feedback received through business relationship management.

Making the most of measured metrics

Service desk managers should create performance reports based on the needs and requirements of the target audience. This may include top-level highlight reports for senior management, detailed performance reports for each support group, individual reports showing activity of service desk analysts, and customer reports. There may also be metrics that are not shared, but used by the service desk manager to monitor performance of the team.

Reports should contain commentary, analysing and finding meaningful patterns in the data. It is important to highlight and promote successes as well as identifying areas for improvement.

Analyst reports can be reviewed in 1-2-1s to allow the analyst to know how well they are working and where they can improve, or whether there are any reasons that they are not performing as well as they could. It is also possible to highlight any training that may be necessary to improve the work that the team do. Furthermore, taking the time to invest in your team and work with them to improve is very likely that staff morale and satisfaction will be higher as a result.

Measuring the unmeasurable

Surveys are one of the most efficient ways of measuring customer experience. Typically, an event survey is sent out when a ticket is closed or a request is fulfilled, and some service desks do that every 10th ticket or 5th ticket, but you've got to work out what works for your individual service desk.

The important thing is to keep it very simple; if you give a customer 20 questions then may not have time to fill it in. A survey with just one question is likely to have a higher response rate. This question should be fairly generic, for example, "were you happy with the service you received?". In response to this could be four or five measures of satisfaction, represented with happy and sad faces, to avoid any confusion surrounding numerical scales. Following this question, there should be a comments field to allow customers to provide any specific feedback. You may choose to have follow-up questions in the survey, triggered by a negative response, to get more detail of the customer's dissatisfaction.

The role of metrics in service improvement

Perhaps one of the most significant benefits of measuring metrics on the service desk is utilising the data you collect to improve your service. We have previously discussed the potential damaging effects of measuring and trying to improve one specific metric, yet there are certainly circumstances in which improving performance in one specific area is necessary. It is imperative to do this in a way that minimally impacts other areas, and is sufficiently monitored to quickly spot if other areas begin to suffer.

When entering into a service improvement programme, beforehand you will need to define what success looks like for your service desk. Is it better customer feedback? Is it higher employee satisfaction? Is it seen in higher resolution rates? By understanding how you will measure success, you will have a goal to work towards, which can prevent the programme becoming ineffective or moving the service desk in the wrong direction. A good place to start is to analyse the data you have, identify the problem you're trying to solve, creating a benchmark, and then using that to define what success looks like to you.

One method to start improving your service is to measure a particular area in need of improvement; perhaps measure it daily for a short period of time. This will allow you to almost constantly be aware of whether attempts to improve that area of service is successful.

Conclusion

Metrics are an incredibly useful tool on the service desk; they allow managers to monitor multiple areas of service, can allow them to highlight successes and areas for improvement, and keep an eye on how well service improvement attempts are working. However, if not used efficiently, metrics can become a waste of time and resources, and potentially cause more harm than good.

It is necessary to understand what success means to your service desk, and how metrics can help you achieve it. Furthermore, it may be more beneficial to build up individual metrics into CSFs that cover multiple areas of your service. This will allow you to monitor how working on one area impacts others, such as how improving response time affects first contact resolution rates.

About Zendesk

Zendesk was built upon a simple idea: make customer service software that's easy to use and accessible to everyone. We have expanded on that idea, and now offer a growing family of products that work together to improve customer relationships, and can be embedded and extended through an open development platform.

Our products are easy to use and implement. They give organizations the flexibility to move quickly, focus on innovation, and scale with their growth.

Zendesk makes software for better customer relationships.

About SDI

The SDI company mission is to inspire service desks to be brilliant. To achieve this mission SDI has developed a set of goals by which it aims to inspire service desks to:

Embrace:
To raise the quality of service delivery by valuing best practice

Engage:
To create an inspiring and engaging customer experience

Invest:
To empower their teams to be inspired, take action and be better

Shine:
To demonstrate and deliver exceptional business value

SDI sets the globally recognised best practice service desk standards that provide clear and measurable benchmarks for service desk operations and professionals. The standards are designed to encourage service desks to embrace and value best practice in order to raise the quality of service delivery. For more information about SDI please visit **www.servicedeskinstitute.com**