Q&A from February 9, 2012 Webinar:
Using Six Sigma to Drive Tangible Service Desk Improvement and Savings

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1.	**Q: Two related questions:** **1 - How do you define what IT measurements are meaningful (KPI)?** **2 - Best way to measure Customer Satisfaction?** A: So many KPIs to choose from? Well, I love two tools that help prioritize: 1. Balanced Score Card (BSC). 2. Voice of the Customer (VOC). Balanced Scorecards help understand the business environment and business drivers. Is financial improvement badly needed? Or Customer satisfaction? Use the BSC to refine which KPIs are most important to the business. Even more so, I believe in taking the time to understand the customer, a focus that is referred to as "Voice of the Customer (VOC)." Customer Satisfaction is one of the outputs of a Voice of the Customer initiative, as well as also understanding wants, needs, engagement levels, drivers of dissatisfaction, etc. The VOC helps to ensure that KPIs that are focused on will lead to improvement in directions that customers will recognize and appreciate. Customer satisfaction measurement starts with periodic surveys. Survey the stakeholders who have experience with your product or service. The surveys should be carefully worded and calibrated based on survey best practices and analyzed correctly. BSC and Voice of the Customer again help to structure the right surveys. Quantitative surveys can then be followed by focus groups that are facilitated and managed professionally to ensure they are productive and useful. In addition, frequent informal dialog and discussion is always useful to help interpret the trends and data, but such informal and anecdotal feedback does not replace quantitative measures. With all customer satisfaction measures be sure to differentiate between Customers (paying business stakeholders) and Users (recipients of services and service transactions); both are important but must be understood separately. User surveys are typically coupled to specific interactions with the Service Desk to ensure freshness in the customer mind but can also be periodic if the surveys users tend to have a lot of interaction with the Service Desk.
2.	**Q: If you're using an x-bar chart, don't you also need to include the R chart?** A: You can. For this purpose/example, the team didn't dwell on it in the executive presentations. We only had to get in the ball park to show dramatic improvement and gain approval for the corrective actions, which we accomplished. The Master Black Belt working with the team reviewed all of the other statistical data and ensure our recommended actions were the right ones. In general, I recommend not overselling the statistical and analytical information, but focusing on the business impact and gaining approval for actions.
3.	**Q: How much baseline data did you use in each case?** A: We started with six months of data from incident tickets. In total, there were hundreds of thousands of incident tickets and confirmed that the trends were consistent and that our analysis avoided anomalies and seasonality. Of this larger pool, we pulled about 3000 thousand escalated tickets to analyze the process statistics, root causes, and plans for corrective actions.
4.	**Q: For the 5 year projected savings to the company, what cost drivers made up that forecasted savings for million(s)? Salary Cost of Tiers/ Impact Cost to Users/ etc...?** A: Labor savings estimates were due to reduction in overall phone call and email volume that would hit Tier 1 because of mishandled tickets which in turn led to reduced staffing requirements for Tier 1. Reduced back-and-forth time during escalations also reduced the demand for additional Tier 2 support because of fewer incidents to be escalated as well as a lower burden on Tier 2 staff due to follow-ups and dealing with irate users. We also factored in small impact on Tier 3 productivity (applications development shop) which may not really be saved.

5.	**Q: What was the name of the tool that Kirk was referring? The 3 click tool.** A: We don't endorse tools, typically, but for this project I can tell you we used Minitab which is a commercial product that the client already had a site license for. There are many other tools available.
6.	**Q: Kirk, you placed a large emphasis on "tools". Which tools would you suggest anyone who wants to begin a process similar to what was discussed in this presentation have in their "toolbox"?** A: The point about the tools is that without them, the analysis for this type of project is quite sophisticated and hard to learn or do. Tools built for Lean and for Six Sigma allow people to be trained to harness the power of the techniques, particularly for the statistical analysis and reporting. In general, do a market survey on tools. There are many price points available dependent on your needs and even freeware. You can even use spreadsheets.
7.	**Q: Great Webinar!!! Where can we find the Baldridge Organization Maturity information** A: My favorite question! It is free (for now) and available on the web: http://www.nist.gov/baldrige/ The website contains other great multimedia resources, how-to guides, self-assessment surveys, case studies. I have served as a Malcolm Baldrige Examiner and have used the criteria for over 20 years so I heartily recommend downloading the Award Criteria booklet and as much other information as possible while it is still free. Because of federal budget cutbacks, the Award program has been defunded and will have to rely on a fee-for-service model in the future.
8.	**Q: What tool was used to generate the control chart** A: Minitab.
9.	**Q: What about Excel? It has control charts.** A: In this case study, I looked at using Excel but did not use it because Minitab was available and I found it to be easier to use. If I had no other choice, I would look again at Excel but would also look at other tools on the market.
10.	**Q: How would you produce and manage scorecards over several remote helpdesks?** A: Key factor is consistency. Use as much automation as possible and employ cross-checks, error-checks, and integrity checks. Extensive manual input can lower the consistency, accuracy and, unfortunately, sometimes integrity. Automation can help remove typing errors, personal incentives, bias, and subjectivity.
11.	**Q: How often should OLAs and SLAs be revisited?** A: I usually recommend at least once a year (or semi-annually) because major changes in SLAs and OLAs usually have budget implications. Also, as you go through lessons learned you may also identify other necessary changes. Many organizations have a monthly review process integrated into the larger review of their customer relationships and overall organizational performance.
12.	**Q: What if OLAs and SLAs are contractual and get 'stuck' in status quo?** A: At a minimum, review how well they work or not work; don't run from the facts just because they can't be easily changed. Use the review as a shared discovery and chance for open dialogue. Contractual situations are very hard to change, but it might be possible, especially if there becomes a shared agreement that change is necessary and the parties can work together to work out a compelling business case and prove it is in the best interest of the holder of the contract.

13.	**Q: Thank you for this very well-run webinar. Could you explain the mathematical relationship with the UCL and LCL relative to standard deviation? UCL and LCL are +/- 3 sigma** A: Contract me directly as the answer is in-depth and should be addressed offline. The short answer is it is typically three times the standard deviation above and below the mean. I like the usage of the control charts because every can understand the picture. He Red dots are bad and must be understood, especially if a trend seems to appear. The visceral understanding helps with culture change working towards common improvement goal.
14.	**Q: What happens if you don't have buy-in?** A: Most often there isn't wide-spread buy-in. In this case study, there wasn't buy-in from the Service Desk team, the managers, or the higher tier workers. My general philosophy is that you don't have to get people to buy-in to the result or even to the process, but just get them to be willing to engage. When you lead this kind of project, you can't expect to capture all hearts and minds right at the beginning. It is most important to force the behavior of following the methodology. The hearts and minds will eventually follow. In this case study, to at least force recognition of the need for constructively engaging in the project, the data proved hard to argue with. The reality-check for the team was the initial ticket escalation analysis (as part of the problem statement in the Define phase) and the Voice of the Customer data. By starting with that information, we grounded everyone in the reality that long escalation times were the source of severe customer discontent and also made the Big Boss (that the team members all worked for) very unhappy. When you combine the raw VOC data with the raw data on escalations, people had to accept that they must at least stay in the room and at least appear to be part of the solution. Lastly, we used the principle that we weren't starting out with a preconceived notion about the solution and that we would let the analysis drive us. We accepted that some of the *Resistors* might actually be right, and some of those folks engaged precisely because they thought they could resist change by being proven right. However, once the team followed the methodical project steps, we arrived at a consensus logical conclusion. At that point, the corrective actions could be accepted.
15.	**Q: Is there a website for Kirk?** A: Holmes and Associates, Inc: http://www.holmesinc.net/