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Q: What specific information should be recorded around various CSI initiatives? What medium(s) are typically used?

A: How is this impacting our customers in meeting their objectives and impacting the value of services we are providing? In terms of dollars and/or time savings, how is it helping our customers? And/or how does it improve our efficiency effectiveness of how we do things in the organization. If it's not specific and measurable, then what will our target be? How will we know we are making improvements and by how much if we don't have specific measurements? In addition to the positive impact the improvement is going to have it is helpful to track the costs (time and/or money) and timeline of the improvement initiative.

Q: What techniques can be used to prioritize CSI initiatives taking into account budget and resource constraint realities?

A: It has to get back to the first step of understanding what the vision is. What are the big picture goals and objectives of your customers and what are your goals and objectives as a service provider for those customers? You need that to be the driver. Yes, we must be meeting our availability and performance levels for services but we must also take it to the next level of how our services are impacting our customers' goals and objectives. It gets back to knowing what we are trying to achieve, and identifying cost savings for customers and for the organization. It could also be time savings, and/or reducing/removing activities to improve our performance without increasing costs.

Q: In the IT Service Desk example when you implemented these incremental changes, did you also advertise this to the customers and end-users?

A: We didn't initially, and in some ways I was a little bit ashamed of our answer rate and didn't realize we were losing about 25% of the callers to our service desk. I wanted to improve our key objectives and goals before publishing them. When our answer rate was 80%; we published those to our intranet so they were available to both our team and our customers. We then tracked and showed the history of the performance on our key objectives. It was a great motivator for our team.

Q: You say updating documentation didn't take a lot of dollars, only time. Assuming you did this with existing staff... you must have had to pay OT, OR their productivity / call taking time was reduced at a time when one of your goals was to reduce abandoned calls. Did you capture the expense of the documentation project? If so, can you please explain how? I understand the required investment was minimal compared to acquiring a new tool, but certainly there WAS a required investment, correct?

A: Yes, there was definitely an investment in time but we didn't have money to pay overtime. I'll say a good portion of it was done on our second and third shifts during lulls as the bulk of our contacts were during first shift. Analysts of all shifts worked on the documentation between call peaks. Also, we had a rotation during the day shift to an offline position that handled some escalations and provided opportunities for Service Desk Analysts do catch up on communications and training. Service Desk Analysts were able to use some of this offline time to help with the documentation.

Q: What are the roles and responsibilities of a CSI Manager and is it a full-time role?

A: The answer is: "it depends" on your organization, how big it is and how important CSI is to it. For example, if it's over 700 people and understands the importance of CSI, then yes I would expect it would be a full-time role. In a smaller organization, I would expect it wouldn't be a full time role, it may be just part of someone's role. When we started, it was just our Service Desk doing it within the IT department; we were a group of 30 out of a 500 person IT department. We had to make it visible and trackable. I had the role of CSI Manager for the Service Desk but it was only part of my role as the Service Desk Manager.

Q: Can you speak to leadership changes and CSI? How can CSI thrive, getting buy-in from management?

A: Ultimately it is leadership who will make it, or leadership that will cause it to fail. A lot of cultures were in the mindset of "don't make mistakes" – I was so glad to not see that here in our poll. The leadership that is looking and seeing that as we make improvements, if we have a failure, that's got to be OK sometimes, or else we will never improve. From my perspective, the leadership is key. Leaders need to walk the talk if CSI is going to become part of the normal day to day activities of the organization – part of its culture.