About ITSM Academy

- **Accredited Education**
  - ✓ Certified Process Design Engineer (CPDE)®
  - ✓ ITIL® Foundation
  - ✓ ITIL Capability (OSA|PPO|RCV|SOA)
  - ✓ ITIL Lifecycle (SS|SD|ST|SO|CSI)
  - ✓ ITIL Managing Across the Lifecycle (MALC)
  - ✓ ITIL Service Manager Bridge
  - ✓ ISO/IEC 20000 Foundation
  - ✓ MOF Foundation

- **Practical, Value-Add Workshops**
  - ✓ ITSM Leadership
  - ✓ ITIL, MOF, ISO 20K Overviews
  - ✓ Apollo 13, Visible Ops: The Class
  - ✓ And more!

- Since 2003 - *Tens of Thousands Trained and Certified*
- ITSM Professional Diplomas
  - ✓ Change/Support/SLM
- Public Classes throughout U.S.
- Corporate On-Site Classes
- Virtual Classes
- Courseware Licensing
  - ✓ Corporate & Partner (GEM)
- Alumni Program
- PMI Global Education Provider
- Federal Government (GSA) Contractor
- Certified Woman-Owned

Welcome!

University of Miami

Incident Management Metrics

A University of Miami Case Study

Eddie Vidal

Manager, Enterprise Support Services

October 20, 2011

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Objectives

- Useful information – Why it's important to use metrics.

- UM Approach

- What have we gained – Can you apply this to your job?
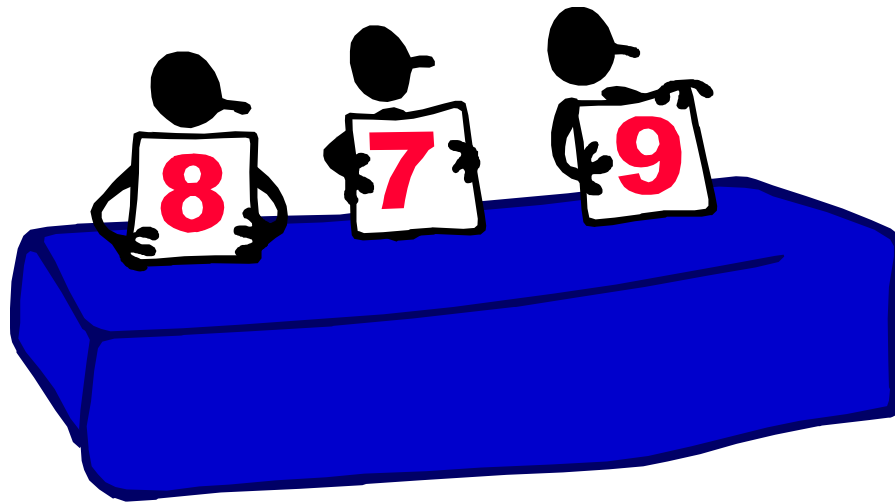
Setting Expectations

- Do we know what is expected of us?
- If you knew, would you do your job better?
- If you knew the results of your work?
  - Know your strengths
  - Work on weaknesses
- Praise, Praise, Praise

UM Approach – Why?

- Recognize top performers
- To demonstrate management cares
- Our goal is to achieve better morale, fair treatment to each team member and obtain consistent performance on a daily basis

UM Approach – Why?

- Specify required performance levels
- Track individual and team performance
- Plan for head count
- Allocate resources
- Justification for promotions and salary increases

UM Approach

- Researched best practices, contacted HDI peers and used HDI Focus Books

- Several Revisions

- Involved and Gained Acceptance from Team

- Obtained buy-in from Management

Acceptance

As a team member of the IT Support Center I have participated, provided feedback and helped develop the measurements used for our annual review and recognition plan. I, hereby, acknowledge that I have read and understand the IT Support Center Measurement procedures. By signing, I acknowledge and agree to the criteria by which I will be measured and understand what is expected of me.

_____   _____
Employee Signature   Print Name

_____   _____
Authorized Signature   Print Name

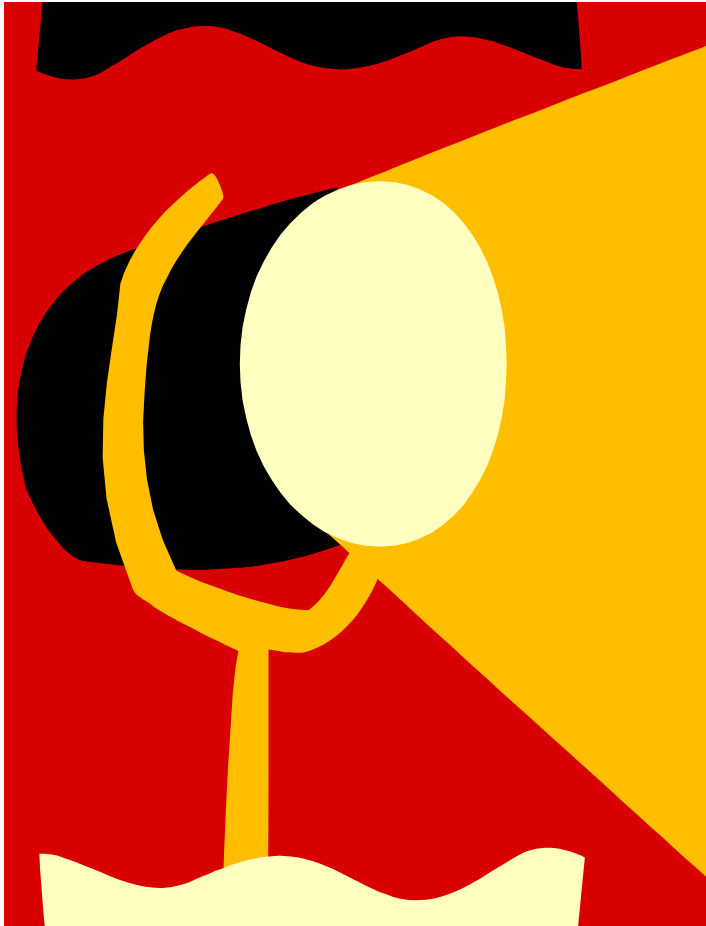_____   _____
Date   Date

Service Desk Analyst Employee of the Month Spotlight on Success

- One paid day off!!!
- Must reach score of 90% or higher
- One employee eligible per calendar month*

*If we have a tie, the employee entering the most Service Requests and Incidents will be the winner.

UM Tools

- Service Desk ACD – Nortel/Symposium
- Incident Management System – Compco by MySoft
- Reports - Crystal and Excel
- Database Administrator

Year	Phone Calls	Incidents	Service Requests
1	26,344	9,830	5,044
2	35,922	15,008	5,339
3	40,719	25,447	6,076
4	40,270	27,791	5,832

What is Measured?

- Call Monitoring 15%
- Incident Tracking 15%
- Average Talk Time 10%
- Percent Available/Logged in Time 10%
- First Call Resolution 10%
- Percent of Service Requests Entered 15%
- Percent of Team Calls Answered 10%
- Service Request/Incident Tracking Accuracy 15%

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Metrics – Call Tracking

- Percent of incidents entered based on total calls answered
  - Example: 75 incidents entered / 100 calls received = 75%
- Weight 15%
- Goal 70%
  - 70% or higher 15 points
  - 50% to 69%, 12 points

Why Do We Track Incidents?

- To build a repository to identify customer training and education needs

- Ability to build self-help solutions to allow customers to resolve many issues with less impact on the support staff – Level 0 support

- Leads to Problem, Change, Knowledge and Release Management?

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Service Requests/Incident Accuracy

- Weight 15%

- Goal 95% accuracy

- Criteria used for grading
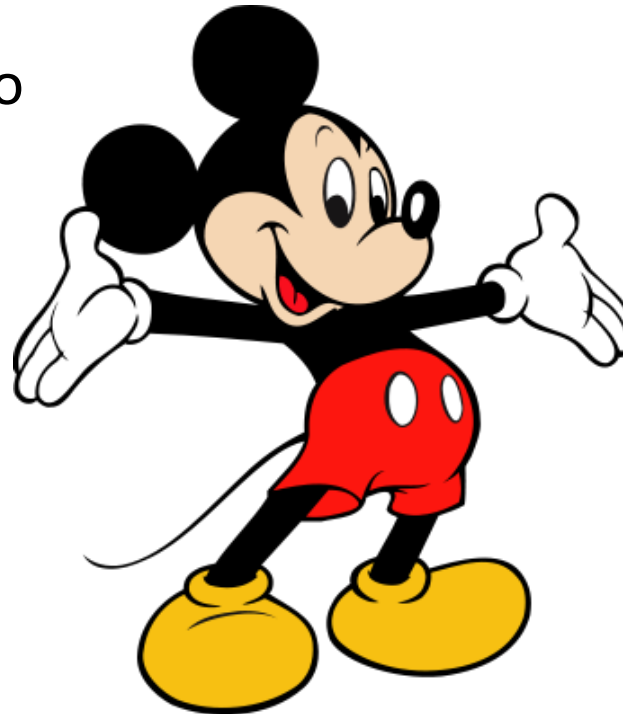 - Location
  - Location
  - Location

Service Request/Incident Tracking Accuracy

- Has the customer been contacted with in 24 hours?

- Are diary entries user friendly?
  - Does the customer understand it?

- Was the customer kept in the loop?

- Was customer sign-off obtained?

University of Miami Approach - Scoring

- Subjective
  - Maybe
  - Not sure
  - Hmm
  - I think so

- Objective
  - Yes
  - No

Percent of Calls Answered

Percent of Service Requests Entered

- Are users calling published number?
- Do you have one Analyst answering most of the calls?
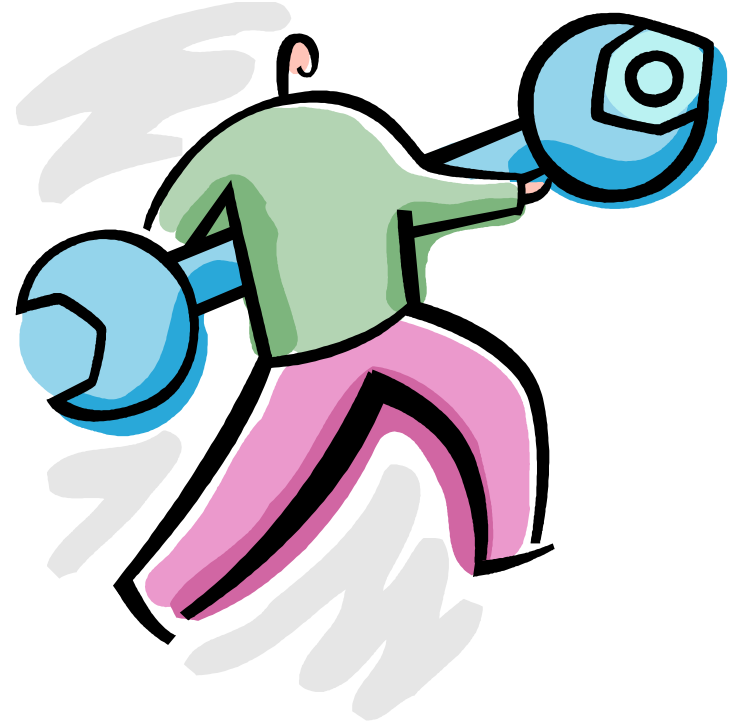
First Call Resolution (FCR)

- Percentage of incidents resolved on the initial contact with the customer
- Used to measure the knowledge and skill level of the analyst
- Weight 10%
- Telecom Goals: 60%

Percent Available Time

- Percentage of total time the analyst has been available to take incoming or make outgoing calls
- Talk time (ACD + DN) + Waiting time – Not Ready time = % Available
- Weight 10%
- Goal: 6 hours 30 minutes of time logged in to the ACD

Average Talk Time

- Average talk time per analyst
  - Average time an analyst spends talking to a customer on each call
  - Used to determine staffing and training needs
- Weight 10%
- Goal 5 minutes
  - 5 minutes or less 10 points
  - 5 minutes or over 0 points

Call Monitoring

In order to improve the customer experience, evaluation of calls are reviewed and graded

10
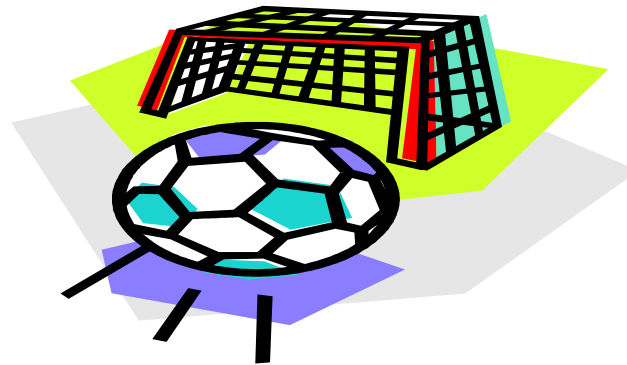
70%

Four Part Scoring

- Greeting the customer
- Key points during the call
- Ending the call
- Behavioral Questions

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Survey Says

- 100 people surveyed - the top 3 answers
- What are the opening questions and/or statements an agent speaks when answering a call?

Greeting the Customer

1

X

3

HELP

Key Points During the Call

1

2

3

4

5

6

7

8

9

10

Ending the Call

1

2

4

5

Behavioral Questions

1

2

4

5

Call Effectiveness Monitoring		January				January Overall Score
Call -->						
Date Reviewed -->	2/2/2010					
Greeting the Customer						
Did the agent introduce him/herself and department?	y					100%
Did the agent ask the customer's name and refer to the customer by name at least twice?	y					100%
Did the agent verbally offer assistance (e.g. "How may I help you today")?	y					100%
Subtotal	100%					100%
Key Points During the Call						
Did the agent identify the customer's department?	y					100%
Did the agent ask for and verify the customer's address?	n					0%
Did the agent ask for and verify the customer's telephone number?	n					0%
Did the agent ask for and verify the customer's reference or IDR number?	y					100%
Did the agent briefly summarize the purpose of the call?	y					100%
Did the agent explain the plan of action to resolve the problem?	y					100%
Did the agent provide an approximate timeline for resolving the problem?	y					100%
Did the agent provide the correct TT# and mention that it is important for future reference?	y					100%
Did the agent provide an extension number when transferring a call?						
Did the agent ask the customer's permission to be placed on hold and listen to the response?						
Did the agent thank the customer for holding?						
Subtotal	75%					**75%**
Ending the Call						
Did the agent offer further assistance?	y					100%
Did the agent thank the customer for calling?	y					100%
Did the agent encourage future calls?	y					100%
Did the agent end the call on a positive note?	y					100%
Did the agent allow the customer to have the last word?	n					0%
Subtotal	80%					80%
Behavioral Questions						
Did the agent adequately answer all of the caller's questions?	y					100%
Was the agent's overall attitude positive and friendly?	y					100%
Did the agent speak audibly and clearly?	y					100%
Did the agent apologize for inconveniences caused?	n					0%
Was the agent courteous and empathetic?	y					100%
Subtotal	80%					67%
TOTAL	**84%**					**84%**

Taking it to another level

- Use an incident for same call

- Follow the trail from beginning to end

- To post or not to post?

- Create competition

Bonus Points

- Knowledge Database Document Contribution
- Training, ULearn
- Seminars attended
  - Must return and present to the team what you learned from the seminar and how it can be applied to the job or team
- Presentations to the Team (SME)
- Unsolicited Customer Commendations

Additional Performance Appraisal Requirements

- Professional Development
- 10 hours of class time per calendar year:
  - PDTO CBL
    - Conflict Resolution in Everyday Life, Customer Service for the Professional, Setting Personal Goals
- Certification once per year
  - Microsoft Certified Desktop Support Technician (MCDST)
  - Microsoft Certifications for IT Professionals
  - A+, Network +, Security +, ITIL, VoIP

Customer Service

- Answering the phone is a mindset. Ask yourself these questions when answering the call.
  - Do you want to answer the phone?
  - Are you excited for the potential opportunity when the phone rings to help or solve the customers problem?
- If you answered NO to any of the above questions do you realize the customer can feel this attitude?

Who Performs Customer Surveys?

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Customer Surveys

1. Overall **quality** of IT Support Center Staff?

2. IT Support Staff handling my problem was **knowledgeable**?

3. IT Support Staff handling my problem was courteous and **professional**?

4. Incident was **resolved** to my complete satisfaction?

5. Resolution of your incident completed in a **timely** manner?

Telecommunications Customer Support Performance Dashboard

Total Score

90 – 100 Exceeds Standards	80-89 Meets Standards	70-79 Needs Improvement	< 69 Unsatisfactory

Individual Goals 90%

Call Tracking Weight 15%	First Call Resolution Weight 10%	% of calls answered versus team total Weight 10%	Available Time Weight 10%
70% = 15 Points 50% = 12 Points 40% = 9 Points 30% = 6 Points 20% = 3 points < 20% = 0 Points	60% = 10 Points 50% = 8 Points 40% = 6 Points 30% = 4 Points 20% = 2 Points <20% = 0 Points	*Based on 5 employees* > 20% = 10 points 10 - 19.9% = 8 points 5 – 9.9% = 6 points < 5% = 0 points	6.5 Hours = 10 Points 5.5 Hours to 6.49 = 5 Points < 5.5 Hours = 0 Points

WO & TT Accuracy 15%	Average talk time per analyst – Weight 10% Must average less than 5 minutes to earn all 10 points	% of work orders entered verus team total Weight 15%	Call Monitoring 15%
95% = 15 Points 90% = 12 Points 85% = 9 Points 80% = 6 Points < 80% = 0 Points		*Based on 5 employees* > 20% = 10 points 10 - 19.9% = 8 points 5 – 9.9% = 6 points < 5% = 0 points	70% = 15 Points 60% = 12 Points 50% = 9 Points 40% = 6 Points < 40% = 0 Points

Bonus Points
Knowledge Data Base Document contribution – 2 to 5 points based on complexity Training – E-learn, Microsoft, ULearn – 2 points Seminars attended – 2 points Presentations to the Team – 5 points Unsolicited Customer Commendations – 3 point

I have reviewed the above metric measurement requirements for the position of Customer Support Representative. I understand these will be used in the annual performance evaluation and will be measured and reviewed on an ongoing basis.

_____   _____   _____
Print Name   Signature   Date

Agent Performance Dash Board

For the period Monday August 3, 2009 to Monday August 31, 2009

	Score	Calls Answered	Availability	Avg Talk Time	% Team Answered	Tickets Entered	% Calls Logged	1st Call Resolution	Orders Entered	% Orders Entered	Agents Available	WO and TT Accuracy	Call Monitoring
Anthony													
Monday, 08/03/2009*	86	71	142.4%	1:49	39.2%	31	43.7%	48.4%	9	36.0%	4		
DAILY SCORE:	60		10	10	10		9	6		15			
Tuesday, 08/04/2009*	89	49	133.2%	1:41	25.1%	32	65.3%	75.0%	3	13.6%	5		
DAILY SCORE:	62		10	10	10		12	10		10			
Wednesday, 08/05/2009**	93	39	102.5%	1:43	27.9%	29	74.4%	86.2%	7	24.1%	4		
DAILY SCORE:	65		10	10	10		15	10		10			
Friday, 08/07/2009	74	55	104.5%	1:48	43.0%	32	58.2%	65.6%	2	10.5%	3		
DAILY SCORE:	52		10	10	10		12	10		0			
Week-08/03/2009**	96	214	120.7%	1:46	26.5%	124	57.9%	68.5%	21	21.1%	5		
WEEKLY SCORE:	67		10	10	10		12	10		15			
Monday, 08/10/2009	76	59	84.3%	2:34	37.3%	47	79.7%	68.1%	4	23.5%	3		
DAILY SCORE:	53		0	10	10		15	10		8			
Tuesday, 08/11/2009**	100	61	105.0%	2:24	31.9%	44	72.1%	72.7%	7	28.0%	4		
DAILY SCORE:	70		10	10	10		15	10		15			
Wednesday, 08/12/2009**	96	61	100.6%	3:14	33.3%	36	59.0%	77.8%	7	28.0%	4		
DAILY SCORE:	67		10	10	10		12	10		15			
Thursday, 08/13/2009	76	50	107.4%	2:20	29.8%	21	42.0%	38.1%	10	21.3%	4		
DAILY SCORE:	53		10	10	10		9	4		10			
Week-08/10/2009**	96	231	99.3%	2:39	27.2%	148	64.1%	67.6%	28	25.2%	4		
WEEKLY SCORE:	67		10	10	10		12	10		15			
Monday, 08/17/2009**	93	82	100.9%	2:06	38.5%	47	57.3%	51.1%	6	33.3%	4		
DAILY SCORE:	65		10	10	10		12	8		15			
Tuesday, 08/18/2009*	86	85	104.6%	2:13	36.6%	50	58.8%	64.0%	6	18.2%	4		
DAILY SCORE:	60		10	10	10		12	10		8			
Thursday, 08/20/2009*	86	72	104.9%	2:20	31.3%	36	50.0%	75.0%	3	18.8%	4		
DAILY SCORE:	60		10	10	10		12	10		8			
Friday, 08/21/2009**	91	62	105.8%	1:54	35.0%	29	46.8%	65.5%	9	31.0%	4		
DAILY SCORE:	64		10	10	10		9	10		15			
August 2009	89	746	108.0%	2:11	18.5%	434	58.2%	66.1%	73	13.6%	5	94	77
MONTHLY SCORE:	89		10	10	10		12	10		10		12	15
Week-08/17/2009**	96	301	104.0%	2:09	27.8%	162	53.8%	63.0%	24	25.3%	5		
WEEKLY SCORE:	67		10	10	10		12	10		15			

Score
**: 90 to 100
* : 80 to 89

% Available
> 95: 10
85 to 95: 5
< 85: 0

Talk Time
<= 5 min:10
> 5 min: 0

% Team (5)
>=20%: 10
10-19.9%: 8
5-9.9%: 6
<5%: 0

Calls Logged
70%: 15
50%: 12
40%: 9
30%: 6
20%: 3

1st Call Resolution
70%: 15
60%: 10
50%: 8
40%: 6
30%: 4
20%: 2
<20%: 0

Orders Entered (5)
>20%: 15
10-19.9%: 10
5-9.9%: 8
<5%: 0

Accuracy
95%: 15
90%: 10
85%: 9
80%: 6
<80%: 0

Monitoring
70%: 15
60%: 12
50%: 9
40%: 6
<40%: 0

Answer/Abandon Rate

Total Calls Received		193
Metric	Total	%
Answered	192	99.5
Abandoned	1	0.52
Abandoned (AT)	0	0.00

Answer Time

Total Calls Answered		192
Metric	Total	%
Avg Speed to Answer	00:08	seconds
In 30 seconds or Less	187	97
31 to 60 seconds	5	3
Average Talk Time	02:07	minutes
Agents Available	6	100.0

Abandon Time

Total Calls Abandoned		1
Metric	Total	%
Avg Abandon Delay	00:00:01	seconds
15 seconds or less	1	100
16 to 30 Seconds	0	0
31 to 60 Seconds	0	0
61 Seconds or More	0	0

Call Tracking

Total Calls Answered		192
Metric	Total	%
Tickets Opened	96	50
Closed	74	77
New	22	22
Closed Same Day	74	77
First Contact Resolution	52	54

Tickets Aging — *as of 8/9/2010*

Total Tickets Open		231
Metric	Total	%
0 to 24 hours	23	9%
48 to 96 hours	15	6%
96 to 120 hours	2	0%
More than 120 hours	191	82%

SLA Compliance*

	Tickets	%
0 to 24 hours	8,424	79%
24 to 48 hours	725	6%
48 to 96 hours	787	7%
96 to 120 hours	139	1%
More than 120 hours	501	4%
Total	10,576	

Breakdown of tickets closed within timeframe for 2010

Work Order Entry Summary — *entered 8/9/10*

Gables	Medical	Total
13	4	17

Top 10 Trouble Codes

ACCOUNT DISABLED 10.31%
CANE ID EMPLOYEE PWD 8.25%
OTHER 7.22%
CALL TRANSFER 6.19%
INFORMATION INQUIRY 6.19%
NETWORK CONNECTIVITY 6.19%
CANE CARD READER 4.12%
CANE ID STUDENT PWD 4.12%
CHANGE DISPLAY NAME 3.09%
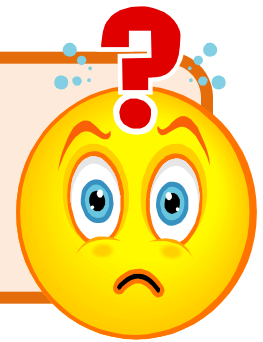COMMUNITE 3.09%
OTHER TROUBLE CODES 41.24%
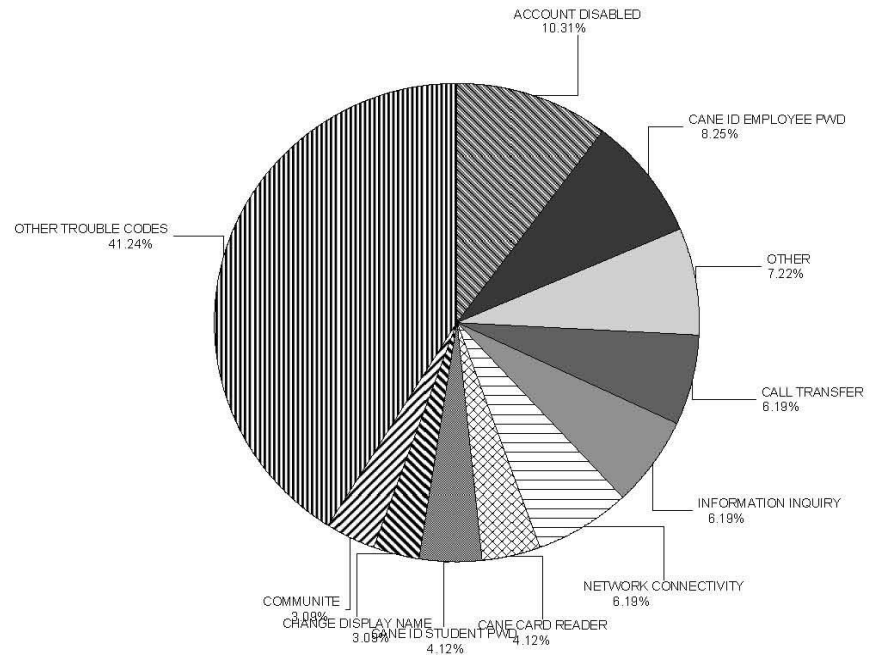
Three Takeaways

✓ Useful information – Why it's important to use metrics.

✓ UM Approach

✓ What we have gained – can you apply it to your job?
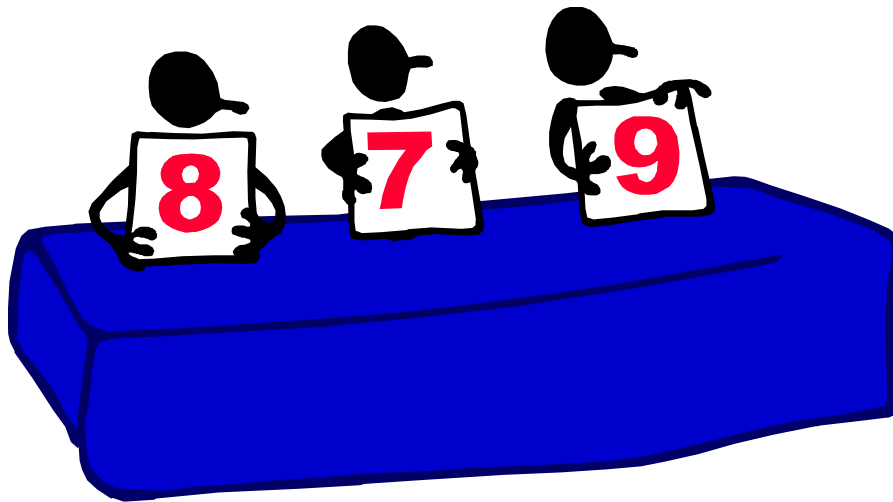
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- Fusion 11 Service Operations Track Chair
- HDI & Fusion Conference Speaker
- HDI Desktop Support Advisory Board
- HDI Member Advisory Board
- HDI Southeast Regional Director
- President of South Florida HDI Local Chapter
- Published in Support World Magazine
- HDI Support Center Manager Certified
- ITIL V3 Foundation & OSA Certified
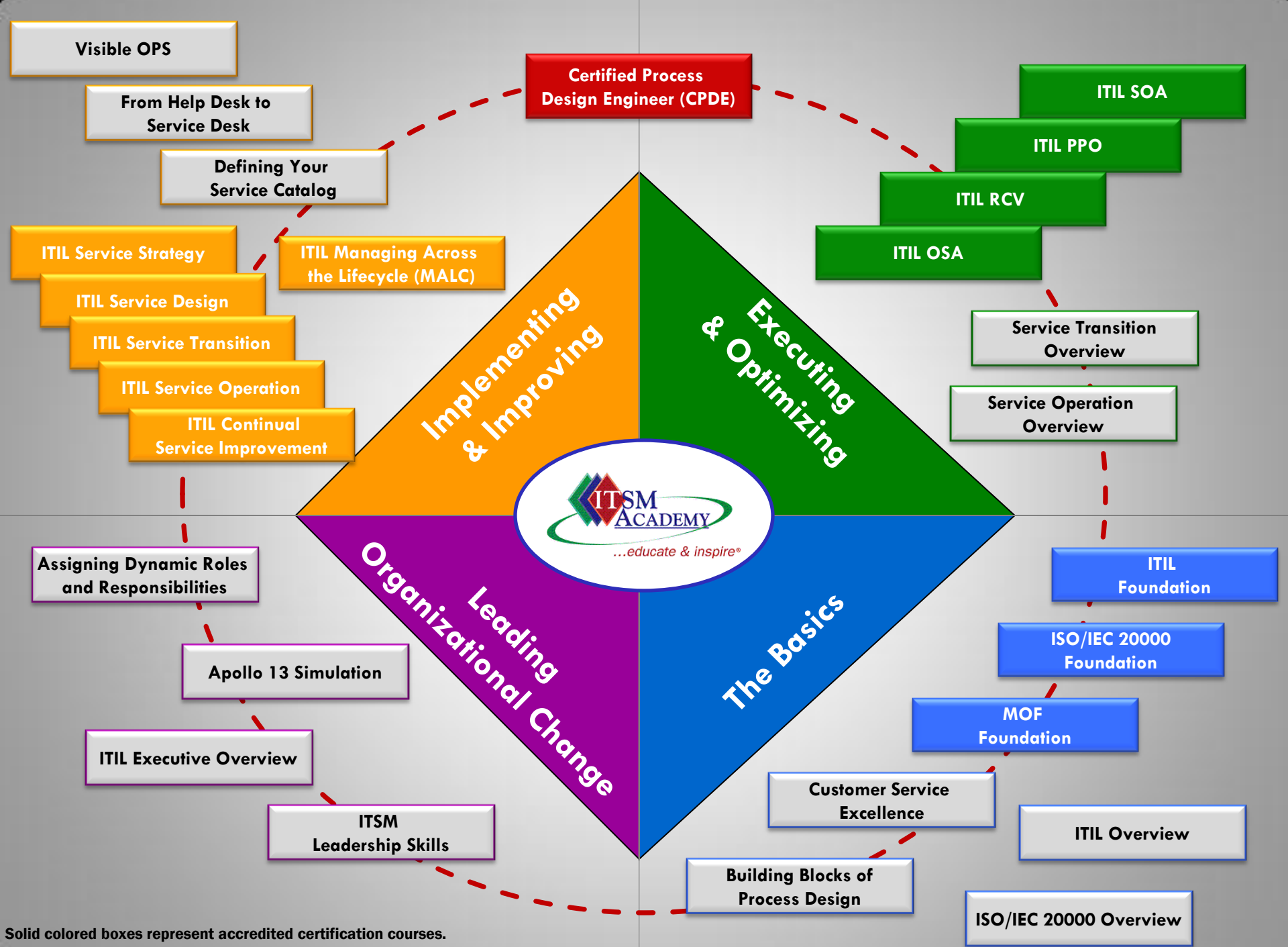
Visible OPS

From Help Desk to Service Desk

Defining Your Service Catalog

Certified Process Design Engineer (CPDE)

ITIL SOA

ITIL PPO

ITIL RCV

ITIL OSA

ITIL Service Strategy

ITIL Managing Across the Lifecycle (MALC)

ITIL Service Design

ITIL Service Transition

ITIL Service Operation

ITIL Continual Service Improvement

Implementing & Improving

Executing & Optimizing

Service Transition Overview

Service Operation Overview

ITSM ACADEMY
...educate & inspire®

Assigning Dynamic Roles and Responsibilities

Leading Organizational Change

The Basics

ITIL Foundation

Apollo 13 Simulation

ISO/IEC 20000 Foundation

ITIL Executive Overview

MOF Foundation

ITSM Leadership Skills

Customer Service Excellence

ITIL Overview

Building Blocks of Process Design

ISO/IEC 20000 Overview

Solid colored boxes represent accredited certification courses.
Grey boxes represent non-certification courses including workshops and simulations.