Metrics Workshop
21 June 2017

By Susan Storey
SDI Auditor, ITIL Expert, consultant and trainer

Metrics Workshop

Agenda

- 10.00 Welcome
- 10.15-11.00 – Introduction to Service Desk Metrics
  - Overview – definitions explored and jargon explained
  - The value of metrics to the service desk
  - Why it's important to get it right
- 11.00-11.45 - Key Metrics to Understand
- 11.45-12 noon COFFEE BREAK
- 12.00-12.45 – Best Practice for Key Performance Indicators
- 12.45-13.45 LUNCH and NETWORKING
- 13.45-14.30 Practical workshop
- 14.30-14.50 – Review of workshop results
- 14.50-15.00 – TEA BREAK
- 15.00-15.30 –Andy Parker, Ivanti – Do service metrics and quantum mechanics really have anything in common?
- 15.30-15.45 Action plan and questions
- 16.00- CLOSE

Overview

- Definitions

- Value to Service Desk

- Importance of accuracy

We like you but we're not sure why ….

Why we measure

- To understand what's good and what's not
- To provide management information for decision making
- To influence behaviour
- To improve resource management
- To improve speed and productivity

Terms and definitions

- Metrics:

  measurements taken for specific reason; usually to develop insight

- Measurements:

  detailed dimensions, extent and size of something

- Reporting:

  presenting metrics with supporting information and narrative

- Management Information:

  primarily for business planning and decision making

- Business Intelligence:

  computer-based techniques used to analyse business data

Metric objectives

1. To support and manage a service, process or activity
2. To provide accurate, up-to-date and complete information
3. To validate management decisions
4. To highlight direction and targets for future activities
5. To identify complimentary/conflicting priorities
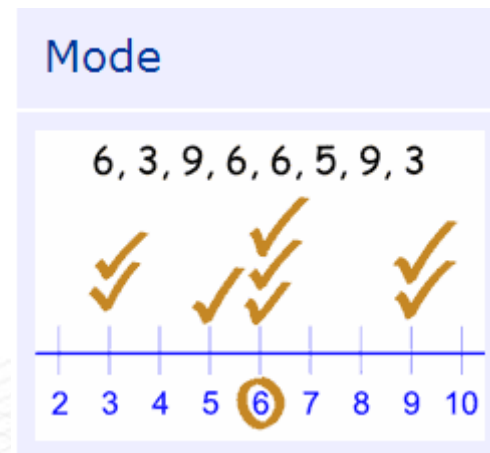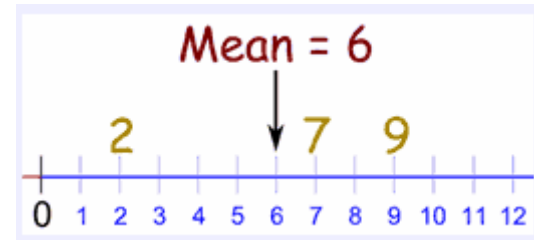6. To ensure adaptability to changing market conditions

Help to connect the dots
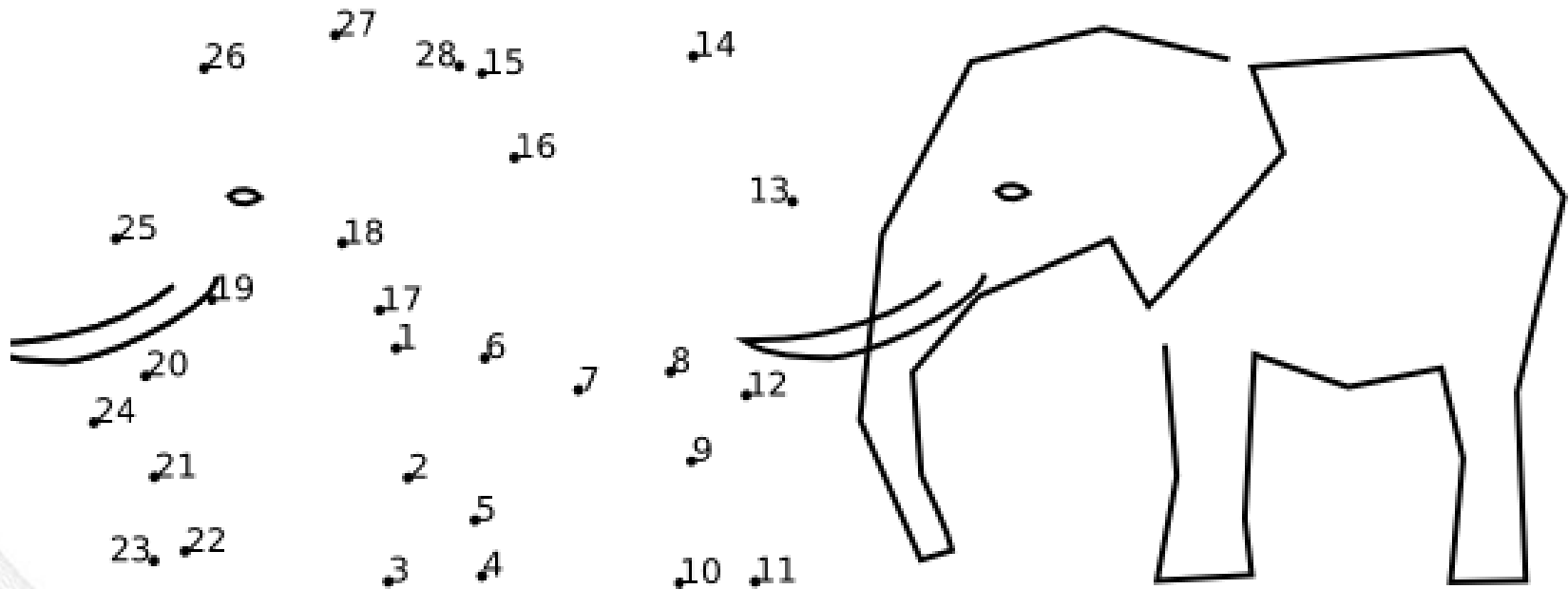
Maths definitions

- Mean average - to calculate: add up all the numbers, then divide by how many numbers there are.

- Mode – the number which appears most often in a set of numbers.

Mean = 6

2   7   9

0 1 2 3 4 5 6 7 8 9 10 11 12

Mode

6, 3, 9, 6, 6, 5, 9, 3

2 3 4 5 6 7 8 9 10

www.servicedeskinstitute.com
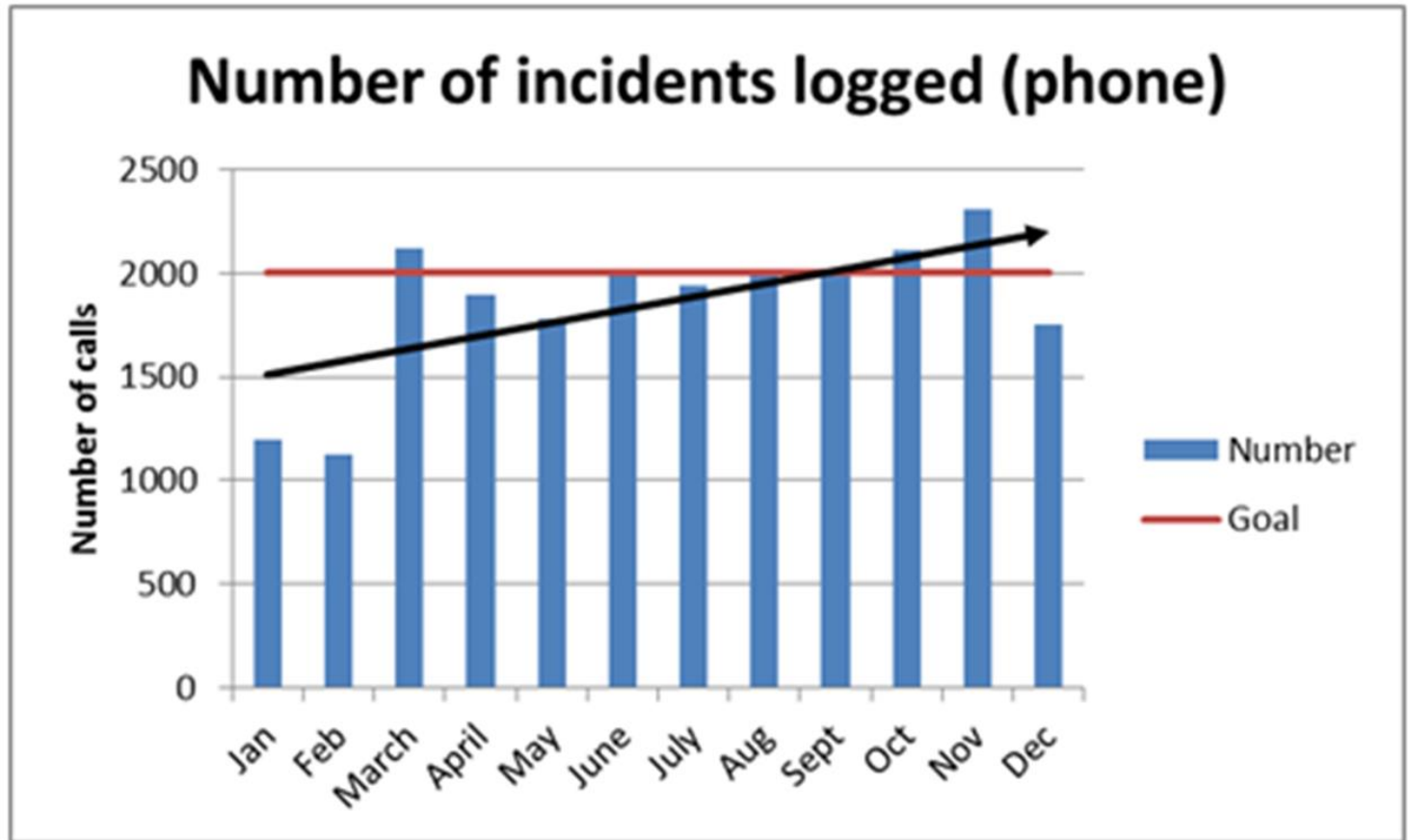
Value to service desk

Rules of measurement

- Link to the bottom line
- Link to corporate objectives
- Be forward looking

Goals, objectives, targets and trending

- Goal – an aspiration for where you want to be

- Objective – explains how the goal will be met (SMART)

S	**SPECIFIC**	Details exactly what needs to be done
M	**MEASURABLE**	Achievement or progress can be measured
A	**ACHIEVABLE**	Objective is accepted by those responsible for achieving it
R	**REALISTIC**	Objective is possible to attain (important for motivational effect)
T	**TIMED**	Time period for achievement is clearly stated

- Target – tactical, small attainments towards gradually achieving the goal

- Trending – a line of best fit on a graph showing the general direction of progress or regress

Using goals, targets and trend lines

Common metrics to understand

What Service Desk Managers measure

- ASA (Average Speed to Answer)
- ABA (Average Abandon Before Answer)
- ATT (Average Talk Time)
- Availability to take incoming calls
- Average call time
- FCR (First Contact Resolution)
- FLR (First Level Resolution)
- User recalls (user calls to chase up)
- Calls fixed within SLA
- Calls breaching SLA

SDI benchmark survey 2015

What is the main indicator of success for your service desk?

	2007	2009	2011	2013	2015
Number of calls/issues fixed vs. number received	32%	45%	32%	34%	37%
Customer satisfaction measures	44%	37%	52%	49%	34%
Improvements to service quality	13%	12%	10%	12%	18%
Productivity improvements	7%	4%	4%	4%	7%
Reduced cost per head of IT support	3%	2%	2%	1%	4%

Productivity measures

Count sheep whilst tending your flock

$$\text{Analyst Utilisation} \quad \frac{\text{(Avg No. of calls handled by SDA pcm) x (Avg call handle time in mins)}}{\text{(Avg No. of days worked pcm) x (No. of work hrs in day) x (60 mins/hr)}} = xx\%$$

$$\text{Analyst Utilisation} \quad \frac{\text{(500 calls/pcm) x (10 mins/call)}}{\text{(21 working days pcm) x (7.5 work hrs per day) x (60 mins/hr)}} = 52.9\%$$

What do SDAs do all day?

- Log and deal with incidents
- Log and deal with service requests
- And……?

Possible reasons -low SDA utilisation

- SDAs working day not wholly allocated to Service Desk
- percentage of work is service requests
- service requests are not logged
- service requests are categorised as incidents
- not all calls are logged
- SDAs are resolvers on 2nd or even 3rd line support
- SDAs time includes roll outs or project work
- SDA is diverted into training new SDAs
- Desk side support included (travel time not)
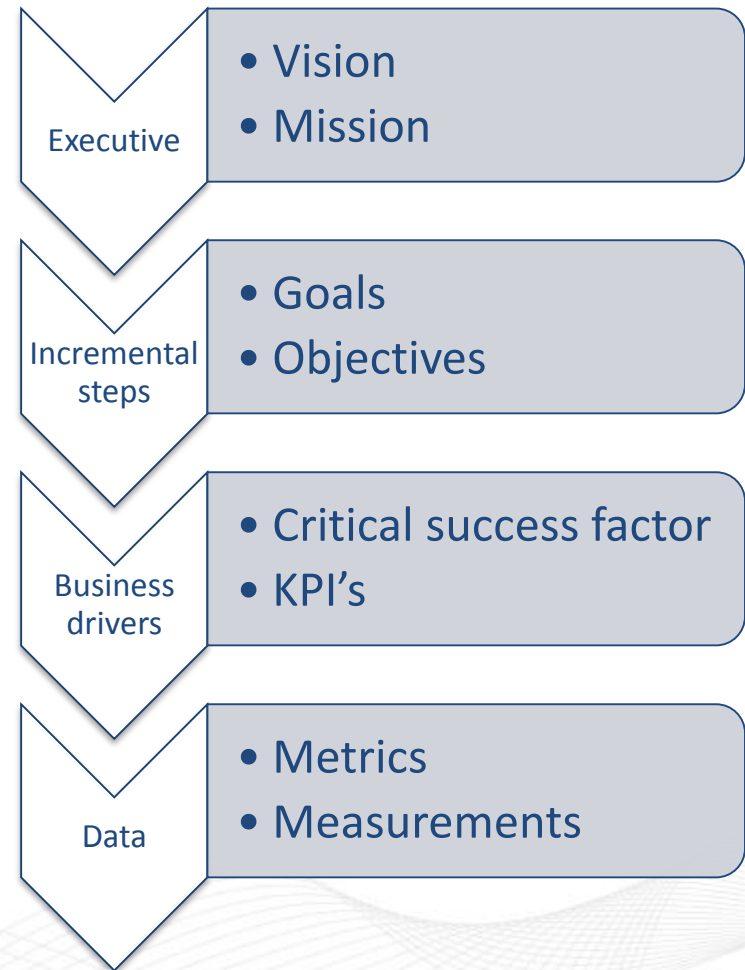
Reasons for reporting on metrics

- To drill down into the dashboard.
- To present KPI's with additional commentary explaining performance highs and lows
- To provide insight and understanding
- To makes suggestions for improvements and recommend actions
- To demonstrate the value of the Service Desk
- To make decisions

Best practice for KPIs

Key performance indicators

- KPI is a collection of metrics used to manage a process, service or activity

- Either qualitative or quantitative

- KPI categories:
  – Compliance
  – Quality
  – Performance
  – Value

Executive
- Vision
- Mission

Incremental steps
- Goals
- Objectives

Business drivers
- Critical success factor
- KPI's

Data
- Metrics
- Measurements

Measurement affects behaviour

Percentage of calls open longer than one day (monitoring backlog)	Unhappy customers who have waited for resolution. SLAs breached have no ultimate time-frame
Percentage of calls closed	Rushed solutions, likely to be reopened and result in drop in customer satisfaction
SLA targets successful	Forced call closure, using stop the clock, logging user recalls incorrectly as new calls
Most logged per SDA per day	Chaotic logging pattern and unsustainable activity, poor attention to customer service mistakes

Customer satisfaction – survey results

Customer satisfaction survey July 2016

1000 surveys sent, 429 received (target 80% return)
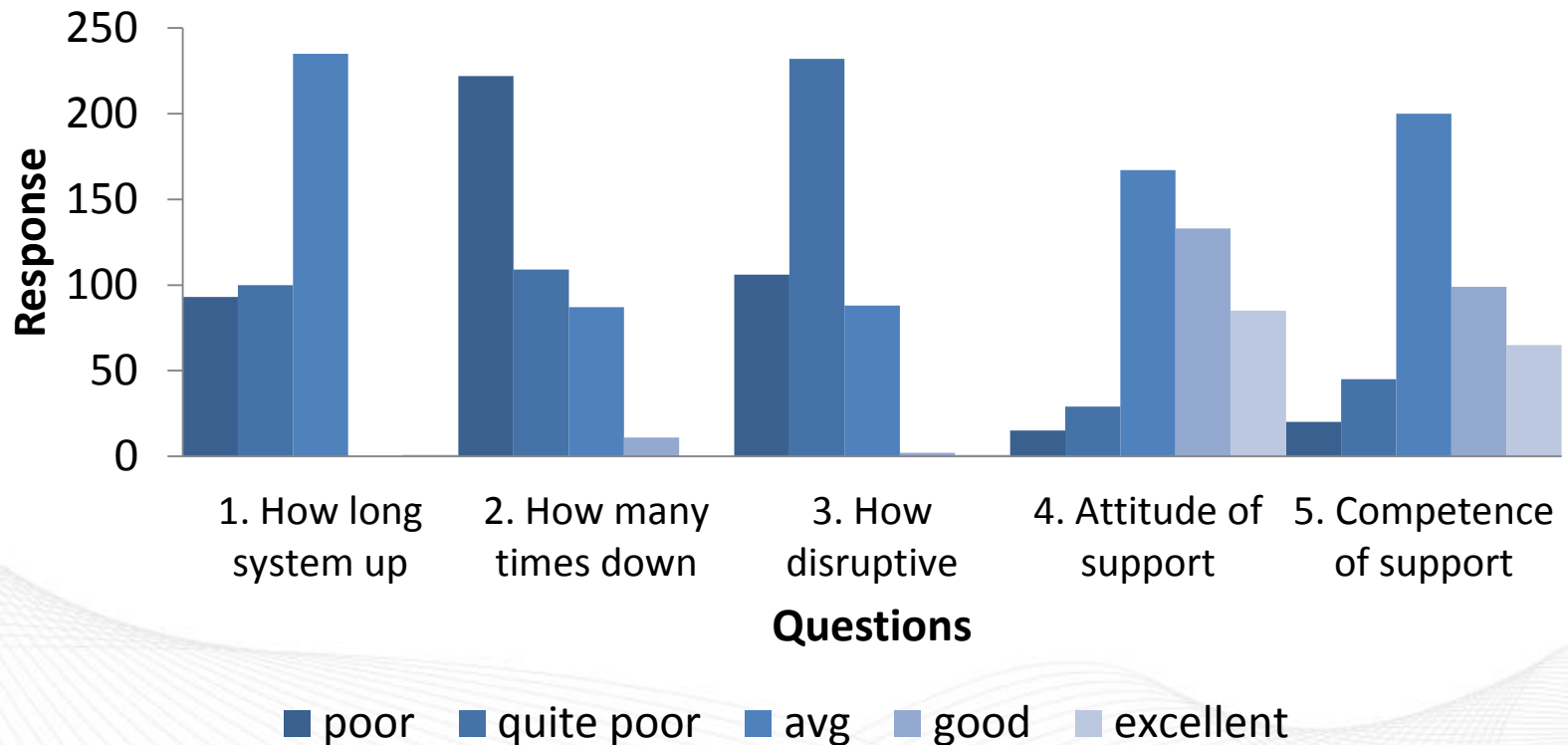
Don't be trapped by data formatting!

Customer satisfaction survey July 2016
1000 surveys sent, 429 received (target 80% return)

Legend: poor, quite poor, avg, good, excellent

X-axis (Questions): 1. How long system up, 2. How many times down, 3. How disruptive, 4. Attitude of support, 5. Competence of support

Y-axis (Response): 0, 50, 100, 150, 200, 250

Weighted scoring

Customer satisfaction survey July 2016
1000 surveys sent, 429 received (target 80% return)
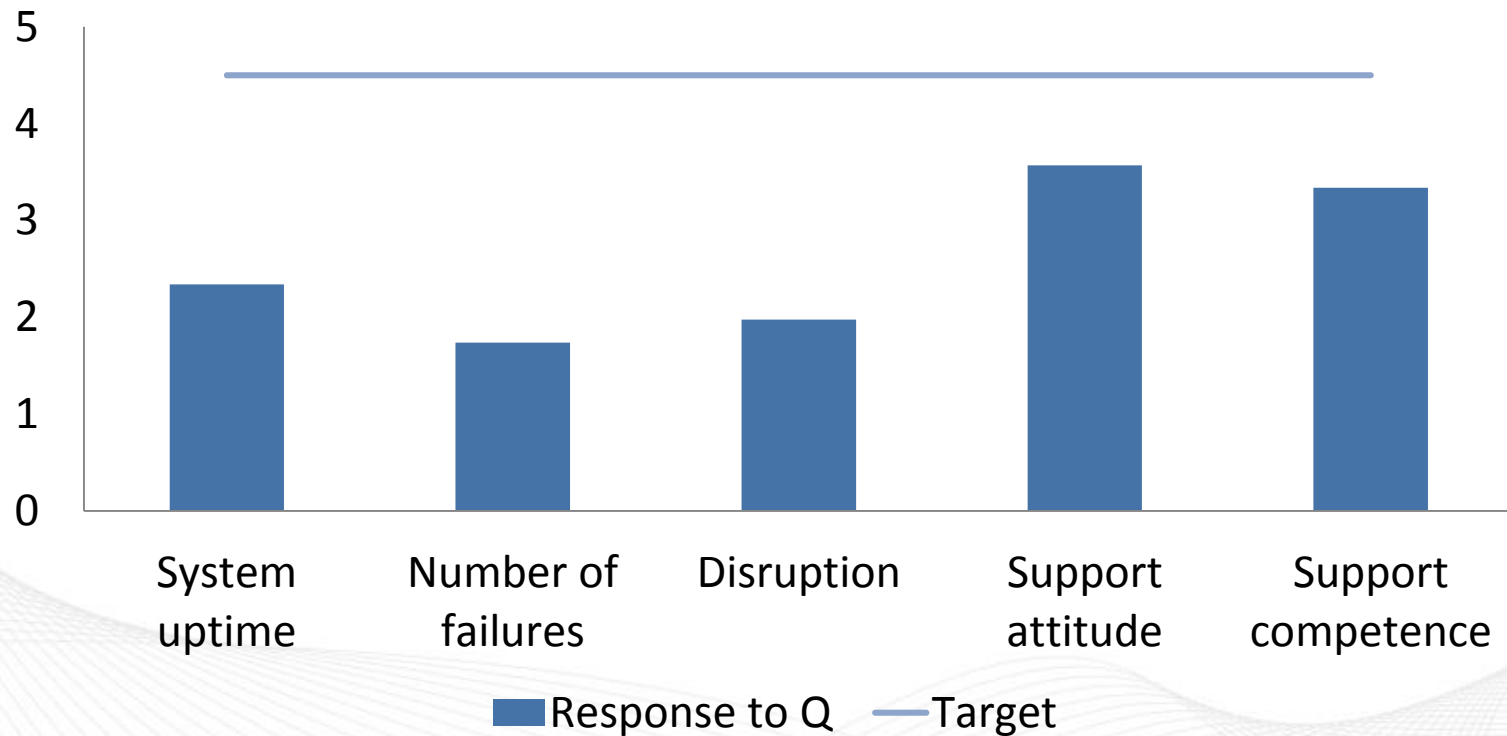
SDC measurement requirements

- Every metric needs a SMART target
- All metrics should be trended towards goals over
  - 3, 6 and 12 months
- All targets should be reviewed at least annually
- Reporting activities must be undertaken
- Business related metrics must be in evidence

Practical workshop
Insight over mathematics

Your task:

Look at the statistics in front of you.

Depending on your group:

- Record your initial observations
- Assess level of quality, compliance, value or performance
- Drill down
  - Ask as many questions as you like for 3 minutes
- Assumptions made

Groups A, B and C

- Group A –Service Desk Team
- Group B –Service Desk Manager
- Group C –non-IT management, Executives and Directors

One measurement, many stories

|	Jan	Feb	Mar	Apr
Calls In	600	650	600	610
Calls closed	550	500	570	580
Printer calls	40	110	25	15
Remote	30	150	40	45
FAQs	5	70	20	30

Workshop review

- Group A –Service Desk Team

- Group B –Service Desk Manager

- Group C –non-IT management, Executives and Directors

What we measured in 2015

2015	Do Measure	Average	Don't Measure
Average speed to answer (seconds)	57%	30	43%
Average call abandon rate	62%	<5%	38%
Average cost per call	15%	£7-9	85%
Cost per e-mail (fully loaded)	4%	£7-9	96%
First contact resolution rate	79%	61-70%	21%
Number of incidents logged on a monthly basis	97%	4001-5000	3%
Percentage of incidents fixed at first level	69%	61-70%	31%
Percentage of escalated to problem status	19%	<10%	81%
Number of service requests logged on a monthly basis	72%	1001-2000	28%

SDI benchmark report 2015

30s

10%

65%

£37,500

61-70%

<=10hours

4001-5000

21-40 hours

1988

52.9%

£22,775

£7-£9
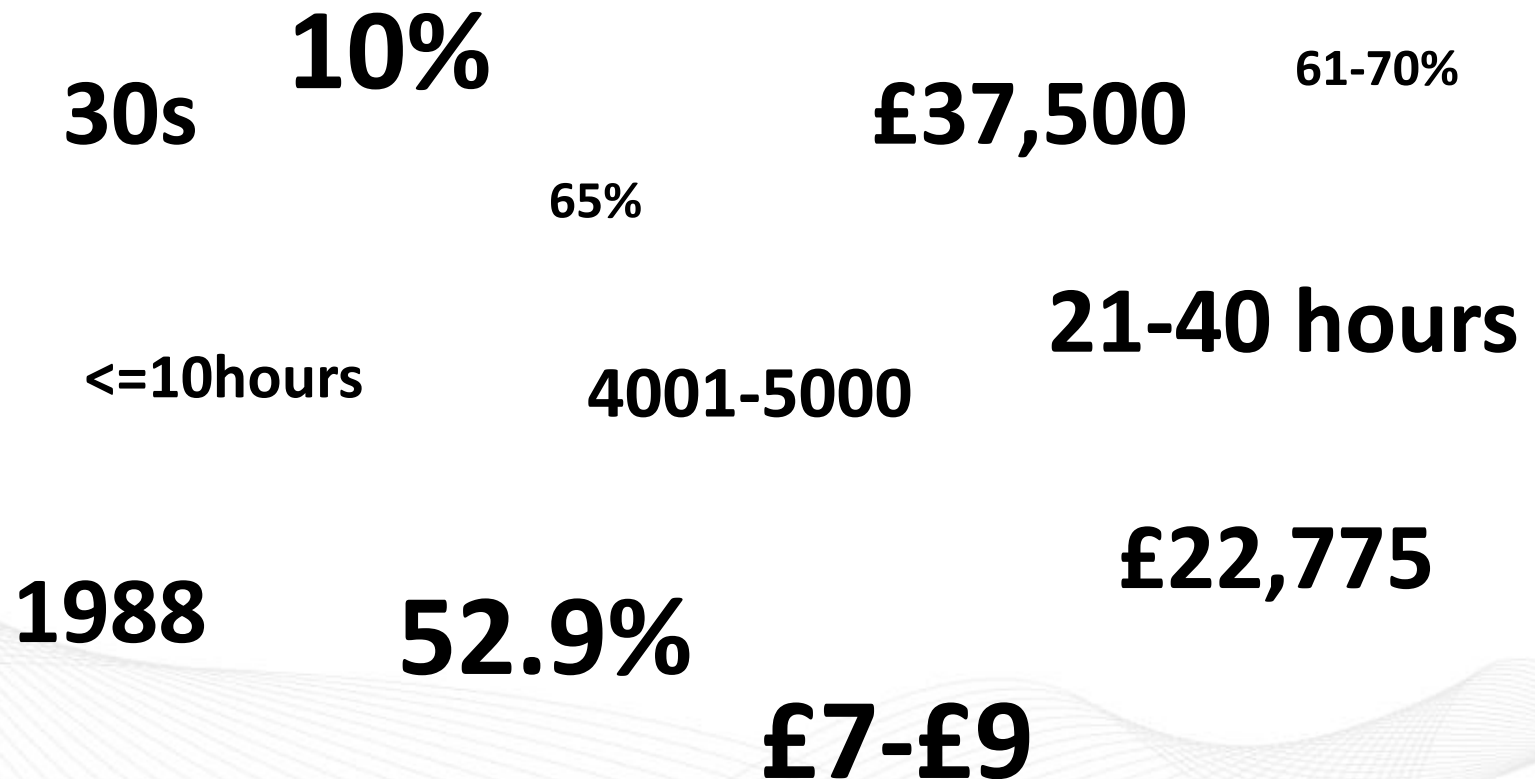
Measures required for SDC

1. Business related metrics
2. Reporting activities (accurate, consistent)
3. Target alignment
4. Number of incidents & number of service requests
5. ATA incidents and ATA service requests (all channels)
6. ABA
7. Average time to resolve incidents and fulfil service requests
8. FCR (Incident and Service Request)
9. FLR (Incident and service request)
10. Re-opened incident and service requests rate
11. Backlog Management
12. Hierarchic escalations (management)
13. Functional escalations (re-assignment)
14. Average resolution time by priority
15. Average resolution time by incident category and service request type
16. Comparison of overall service goals to actual
17. Self-help measured against target
18. Use and Quality of knowledge
19. Monitoring incidents caused by failed changes measured against goals
20. Total cost of service delivery
21. Average cost per incident and service request (cost per contact)
22. Average cost per incident and service request by channel
23. Employee satisfaction feedback
24. Staff turnover
25. Unplanned absence days
26. Periodic customer satisfaction measurement
27. Event-based customer satisfaction measurement
28. Complaints, suggestions and compliments

Making sense of data

Action plan and questions

Summary

- Introduction to Service Desk Metrics
  - Overview – definitions and jargon
  - Value of metrics to the service desk
  - Why it's important to get it right
- Key Metrics to Understand
- Best Practice for Key Performance Indicators
- Practical workshop
- Review of workshop results
- Andy Parker - Ivanti and Metrics
- Action plan, questions

Thank you

Susan Storey
Susan.storey@bcs.org.uk
07831 576615

© Susan Storey Associates Limited