

# “Purposeful Support Practices”

Presenter: Peter J. McGarahan  
January 24<sup>th</sup>, 2012



**12 years with PepsiCo/Taco Bell IT and Business Planning**

**Managed the Service Desk and all of the IT Infrastructure for  
4500 restaurants, 8 zone offices, field managers and  
Corporate office**

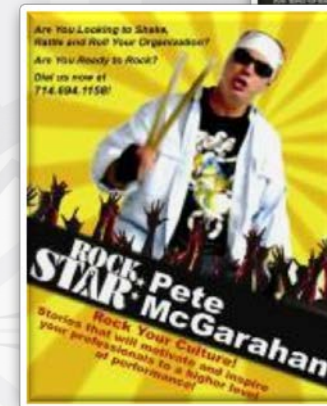
**2 years as a Product Manager for Vantive**

**Executive Director for HDI**

**6 years with STI Knowledge/Help Desk 2000**

**7 years with McGarahan & Associates ([www.mcgarahan.com](http://www.mcgarahan.com))**

**2 years as Chairman, IT Infrastructure Management  
Association ([www.itimassociation.com](http://www.itimassociation.com))**



**MCGARAHAN & ASSOCIATES**

*Service and Support Value*

**“It’s tough to be strategic when you are delivering daily operations tactically.”**

STRATEGIC	TACTICAL	OPERATIONAL
Creating long-term vision, goals and objectives based on achieving a desired end result	Implementing projects or continuous improvement activities moving you closer to achieving your strategic goals / objectives	Repetitive activities that are the day-to-day core processes that achieve the tactical performance goals, objectives & SLAs



**Service leaders must allocate the right amount of time for strategic thinking and initiatives to:**

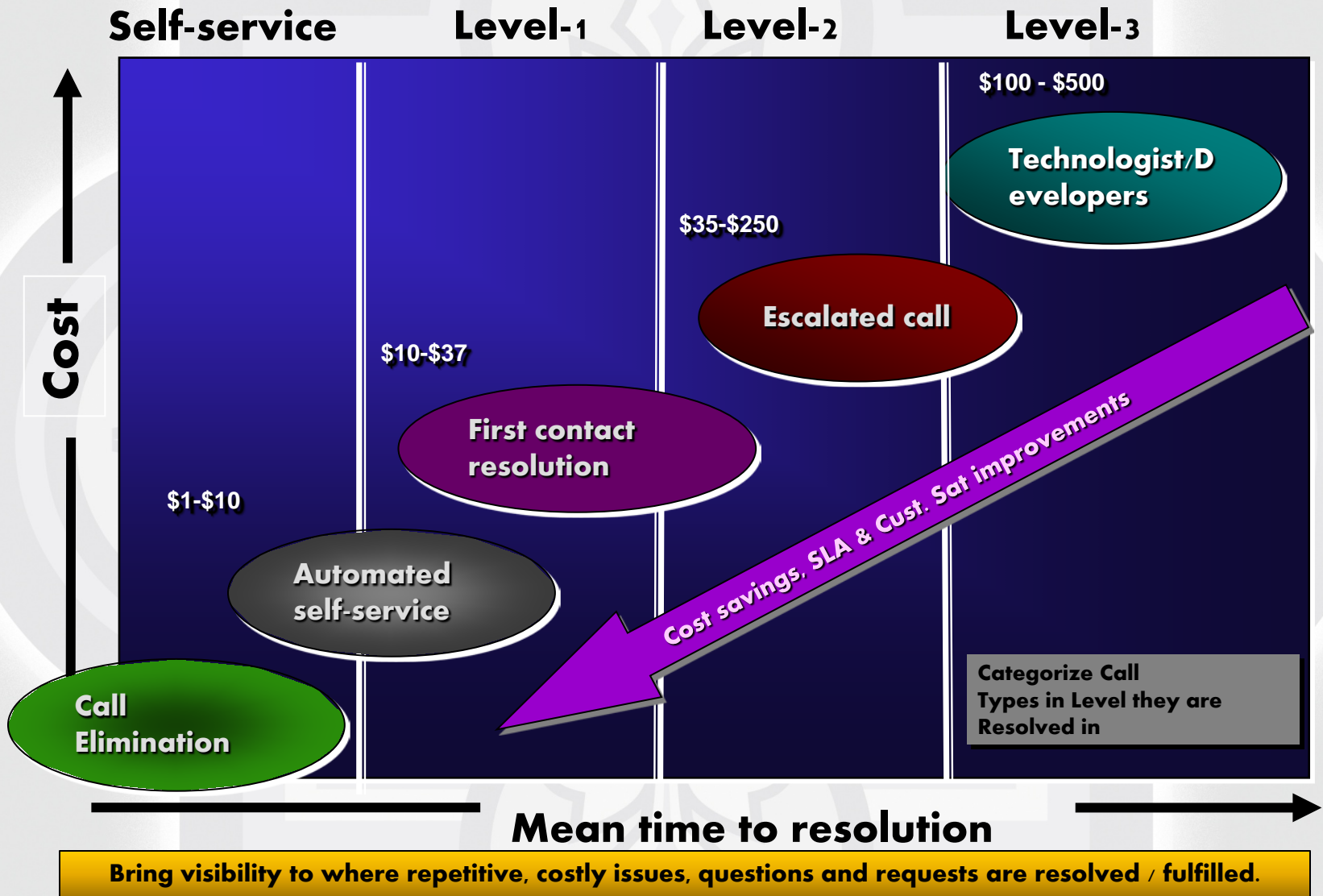
- 1. Align goals and objectives**
- 2. Establish directives to govern scope of services**
- 3. Build success metrics to measure business value.**



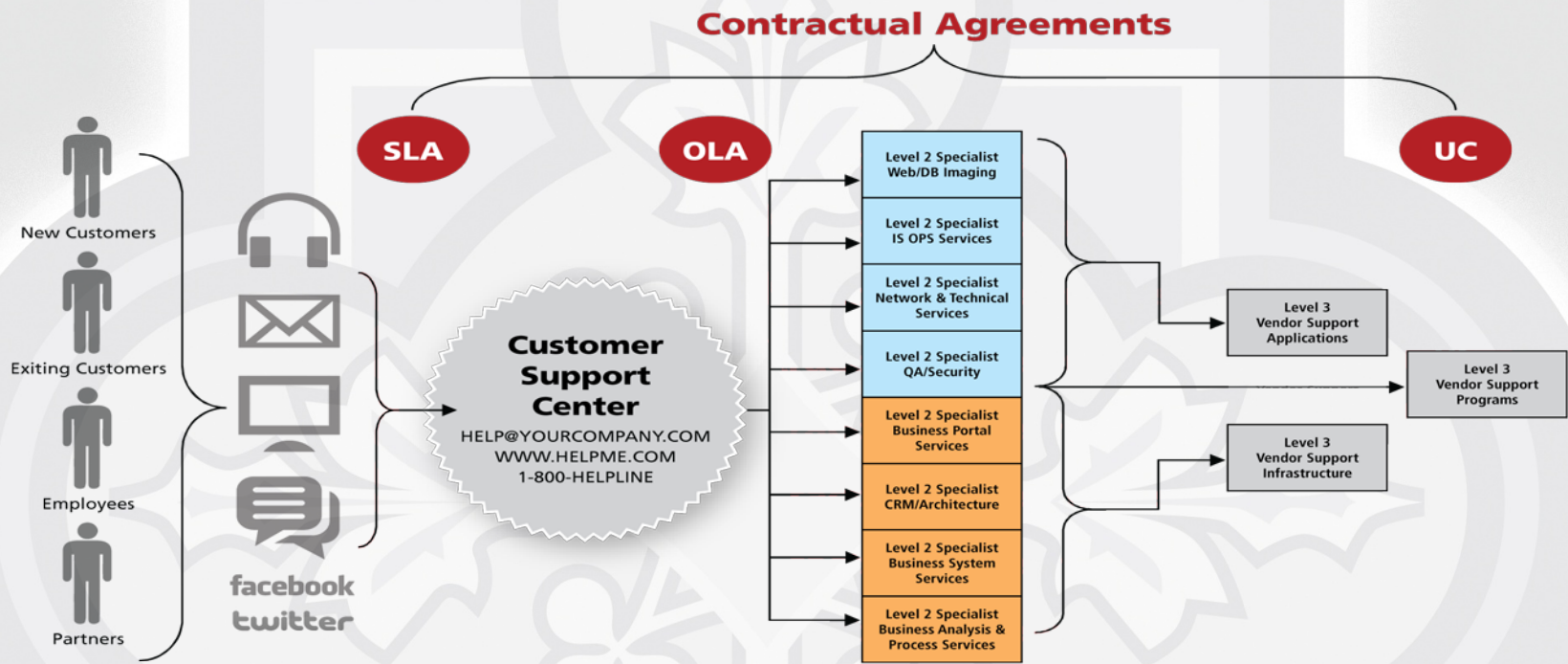
**“Strategy without tactics is the slowest route to victory. Tactics without strategy is the noise before defeat.”**  
*Sun Tzu (Chinese General and Author, b.500 BC)*



# Shift-left Strategy



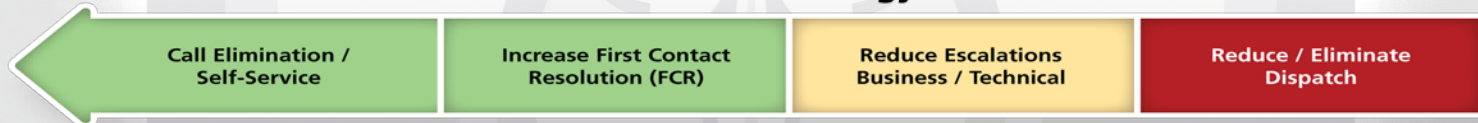
# The Supporting Structure



## Guaranteeing Seamless Transparency and Service Delivery



## "Shift-Left" Strategy



**MCGARAHAN & ASSOCIATES**

*Service and Support Value*



## 1. Know where you are

- Assessing your current performance around service strategy, structure (support model), process, people, tools and metrics is an all-important baseline.

## 2. Know where you are going

- Envisioning the end result is a core part of defining your service strategy.

## 3. Know how you plan to get there

- The continuous improvement roadmap is the result of your gap-analysis assessment against your future-state.



# *Proactively Manage the Demand*

- **Discontinue supporting customers through different “band-aid” incident, request and resolution management processes that use old software, non-integrated tools and heavy customization – all of which limits additional functionality and capability!**
- **Provide the same customer experience across all access “touch-point” channels.**
- **Automate and integrate all processes / technologies into one tightly unified, efficient way to deliver service and support.**



**Customers expect to be able to choose how they request service.**

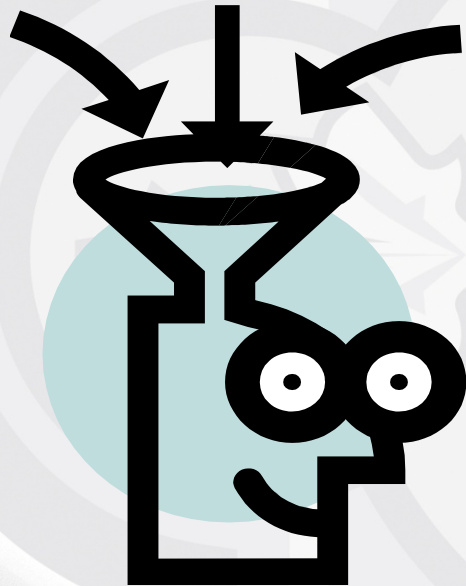


**MCGARAHAN & ASSOCIATES**

*Service and Support Value*



***All Customers  
All Access Channels***



***One, consolidated, streamlined,  
efficient, cost-effective and  
integrated process / tool / people***

- **Improve efficiency, integration and cooperation across all customer 'touch-points'.**
- **Provide the same customer experience across all "touch-points".**
- **Discontinue supporting customers through different "band-aided" processes/systems!**
- **Automate and integrate all processes into one tightly unified, efficient system.**
- **Anticipate the customer's needs and be proactive.**



1. **Achieving First Contact Resolution**
2. **Making UFFA a Priority**
3. **Mapping Call Types for Action**
4. **Introducing Customer-Impacting Technologies**
5. **Balanced Scorecard Storytelling**

Resolve difficult problems faster

Increase first contact resolution

Deliver a more consistent and memorable customer experience.

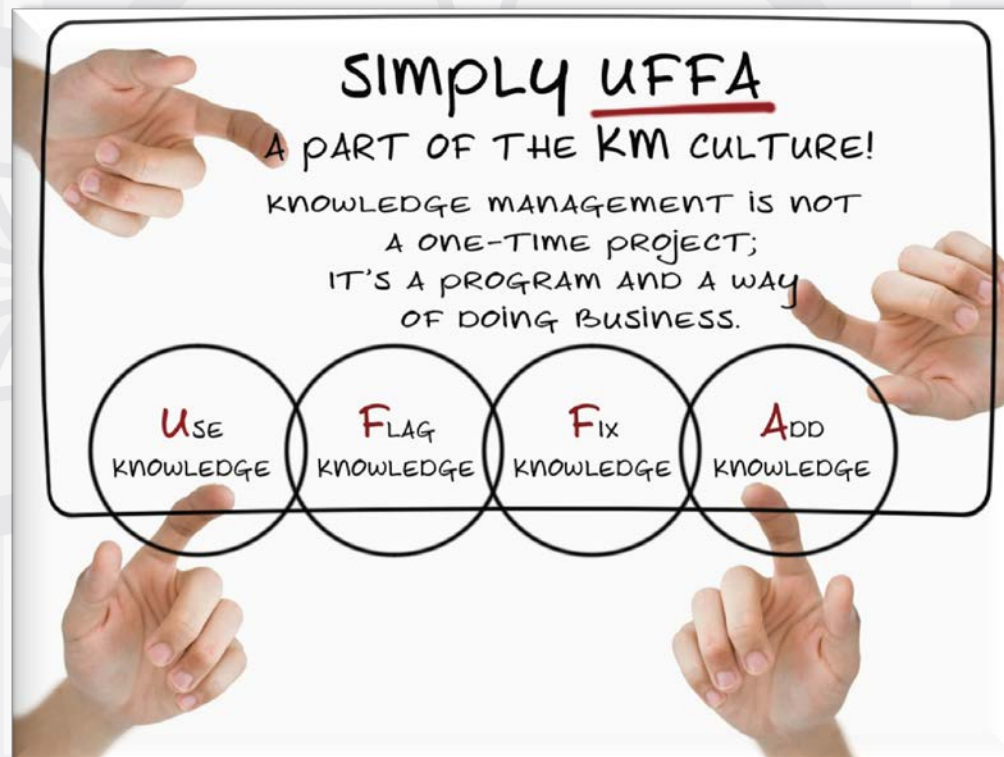


# Achieving First Contact Resolution

- **True First Contact Resolution is the most efficient and effective way to resolve customers' issues not targeted for self-service.**
- **Equipping the frontline with the right training, tools, processes and scripting is critical to success.**
  - Think Pilot 'cockpit'
  - Automating / integrating process workflow into tool's capabilities
- **Know the 'who, what, why' of the call demand.**
- **Success Metrics around FCR:**
  - First Call / Contact Resolution (FCR)
  - Knowledge Base Utilization (KBU)
  - Customer Satisfaction Index (CSI)
  - Mean Time to Resolution (MTTR)
  - Operational Level Agreement (OLA) Response Time



UFFA is a Knowledge-Centered Support (KCS) practice for Using (U), Flagging (F), Fixing (F) and Adding (A) knowledge within the Incident Management process.



- **Track all service and support activity.**
- **Process and Tool as one (Integrated):**
  - The solutions must be provided to the support analyst during the Incident Management Process to facilitate first contact resolution (FCR).
- **Using knowledge when available for timely resolution – minimize escalations.**
- **Use, Add, Fix and Flag (UFFA) capabilities:**
  - Ability to *flag* incidents / problems that require Knowledge Articles to be *added* or current Knowledge Articles to be *fixed*.
  - Ability to contribute their own quality knowledge (*Add*).
  - Incentive, recognition, rewards, performance appraisals around UFFA.
- **Knowledge articles successfully utilized at Tier-1 (FCR) are prime candidates for Self-service.**



# Targeting Stakeholder Adoption



## Knowledge Manager

- Role: To architect the KM process and ensure it's successful implementation and continuous improvement.



## Subject Matter Experts

- Role: To contribute frequently to the creation and maintenance of the knowledge as it relates to their domain and subject area of expertise.



## Front-line Analysts

- Role: To search and use knowledge to resolve issues on First Contact, flag KAs that need fixing and issues that need KAs creating.



## The Collaborators

- Role: Working together, these workers share knowledge real-time and are the ones best positioned to capture as created.



# *The Resulting End*

- **Everyone knows, uses and contributes knowledge**
- **The knowledge is a source of training**
- **Self-service use dwarfs internal IT service and support activity**
- **No more knowledge hunting, it's captured as it happens**
- **The culture cares and shares knowledge freely**
- **A quality focus on measurable results.**

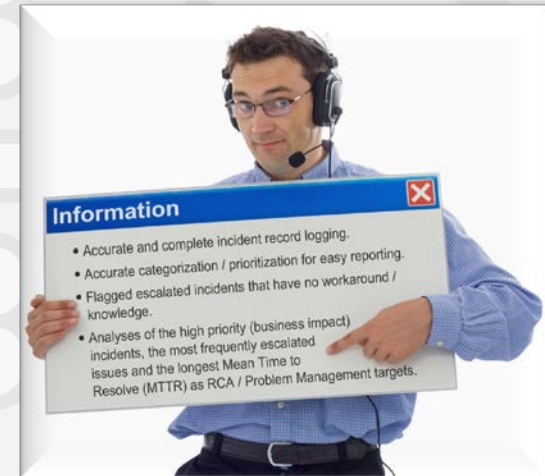
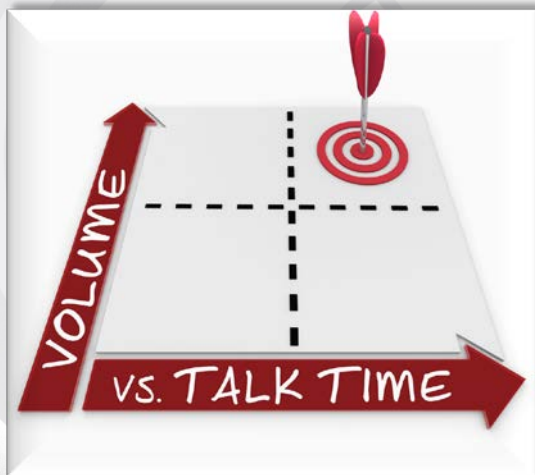


***KA Quality = Use (KBU) & Effectiveness (FCR, R@L0).***



# Mapping Call Types for Action

Knowing the details about the caller, the reason for the call and the call characteristics (volume, talk-time, technical complexity, operational how-to, repetitive, etc.) provides information that is combined with analysis to create an Action Plan for deflecting, directing, training or introducing diagnostic tools, process improvement,



Bring visibility to issues / perform analysis / determine business impact and make recommendations for releasing a long-term solution aimed at eliminating the root cause of a reoccurring problem.





- **Know the Impact**

- Tech vs. Non-Tech
- New vs. repetitive
- High call volume / High talk time

- **Have a plan**

- Direct to Self-service
- Publish Knowledge Articles
- Improve Training
- Route to Problem Mgmt
- Improve diagnostic / troubleshooting skills / tools

- **Measure Impact**

- Take baseline measurements
- Measure actual
- Report progress / impact / reduction

Call Reduction Plan (Volume vs. Talk Time)

High Vol / Low Talk Time Medium Impact				High Vol / High Talk Time Big Impact			
Issue Type	Calls for P1	Call Length	H:M:S	Issue Type	Calls for P1	Call Length	H:M:S
TAS	1088	0:07:07	128:55:22	ICD	2227	0:10:28	416:43:28
Operations	1776	0:04:21	128:48:49	Shift	3093	0:07:02	362:54:33
HMS	515	0:07:19	62:49:58	Inventory	1366	0:09:00	204:48:42
Lock-Ups	417	0:08:06	56:19:10	Cash Mgt	1214	0:08:17	167:36:13
Consumer Call	671	0:04:33	50:52:51	PC	757	0:11:49	149:10:48

Low Vol / Low Talk Time No Impact				Low Vol / High Talk Time Medium Impact			
Issue Type	Calls for P1	Call Length	H:M:S	Issue Type	Calls for P1	Call Length	H:M:S
Delaget	118	0:09:27	18:34:35	Polling	689	0:11:27	131:25:51
CFM	148	0:07:25	18:02:11	Opoll	819	0:09:13	129:45:50
Force Off	126	0:05:38	11:39:39	SMART	511	0:11:55	101:28:37
DP Fran	47	0:07:33	3:54:34	DSL	288	0:16:33	73:55:07
RGM Act.	60	0:05:49	5:48:40	Printers	369	0:09:30	58:22:39

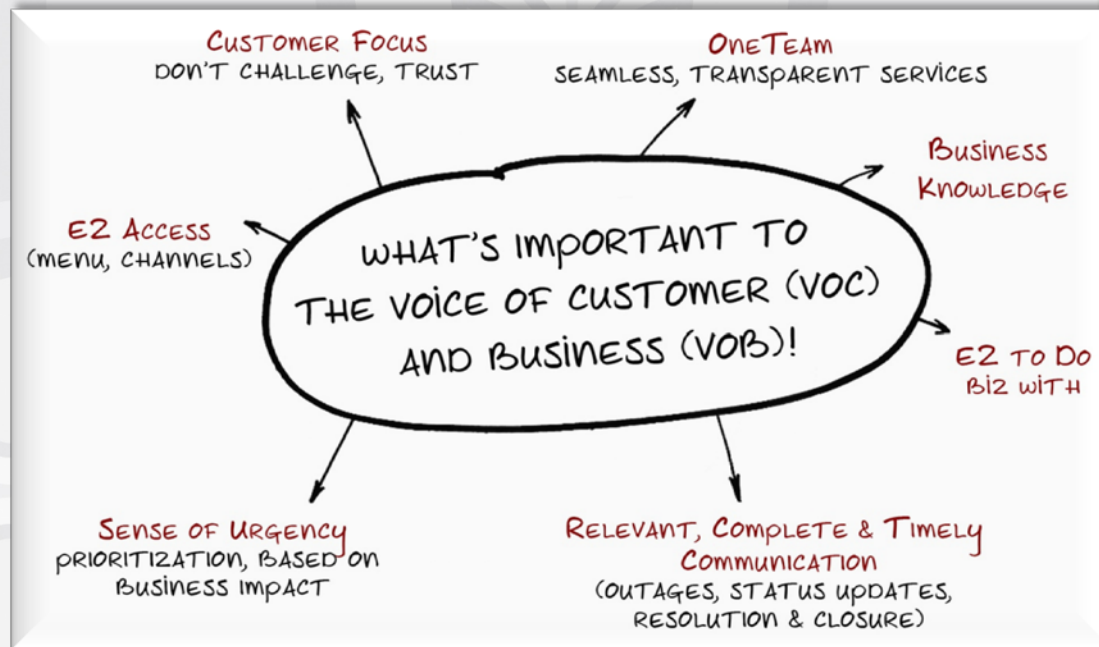
Volume

1/26/2010

Call / Issue Types Included in the Base					
Non Technical Call Types		2009 Calls	Technical Call Types		2009 Calls
TSA End of Day		36,526	Hardware PC		38,161
BOH Cash Management		26,758	BOH Software		19,419
BOH Timekeeping		15,757	POS Polling		15,160
TSA Polling		10,071	Hardware Report Printer		13,556
TSA Cash Activities		9,354	BOH Web Browser		10,085
BOH Inventory (Non End of Day Calls)		32,239	BOH Error Messages		7,017
BOH Direct Polling		24,489	Hardware OCB		6,398
Operations Franchise Office		2,304	BOH Conversion		6,043
Franchise Office		2,190	POS DT Timer		5,542
Operations Facility		1,598	BOH Lock-Ups		5,532
Operations Franchise Bell Net Reporting OMR		552	Hardware VSAT		4,651
BOH Labor Management System		11,362	BOH CFM		4,205
BOH Timekeeping (Non End of Day Calls)		15,757	BOH Forceoff		4,030
POS Operations		35,942	TSA Software		3,694
Operations Consumer Call		24,593	POS Hardware		3,242
POS Configuration		828	Operations Alternate Payment Terminals		2,162
Operations Auditing		165	Hardware Modem		1,457
BOH Miscellaneous		6,611	BOH Data Mgmt		1,220
BOH Above Store Reporting		247	BOH Error Codes		876
BOH HR		129	POS Software		445
TSA Shift Activities		6,057	BOH Instill		326
TSA Shift Change		4,794	BOH closing Made Simple		200
TSA Start of Day		4,709	TSA POS		204



# Introducing Customer-Impacting Technologies



1. **The principle of putting the customer first starts with the design of the Support Center strategy and structure.**
2. **It defines how all services are delivered against customer expectations.**
3. **Putting the customer first is a corporate strategy where the executive team champions the customer and leads by example on a daily basis.**



# Introducing Customer-Impacting Technologies

## STATING YOUR CUSTOMER-FOCUSED COMMITMENTS

IT IS OUR COMMITMENT TO TREAT THE CUSTOMER WITH CARE, AS WE WOULD WANT TO BE TREATED AS PEOPLE, WHO LIKE OURSELVES, ARE ALL COMMITTED TO THE SUCCESS AND SUPPORT ORGANIZATION.

IT IS OUR COMMITMENT TO THE CUSTOMER TO COMMUNICATE THE LEVEL OF SERVICE, CURRENT STATUS AND EXPECTED RESOLUTION TIME FOR YOUR ISSUE OR REQUEST.

IT IS OUR COMMITMENT TO THE CUSTOMER TO DELIVER A LEVEL OF SERVICE, BOTH IN RESPONSIVENESS AND RESOLUTION PRIORITIZED BY SEVERITY AND IMPACT OF THE ISSUE OR REQUEST.

IT IS OUR COMMITMENT TO THE CUSTOMER THAT YOU WILL BE THE FINAL AUTHORITY REGARDING YOUR SATISFACTION WITH THE FINAL RESOLUTION.

- **The Face of the IT / Business**
- **The Voice of the Customer**
- **Resolution Ownership**
- **Quality Assurance (QA)**



**Solve**

**Eliminate**

**Deflect**

**Reduce**



**Measure**

**Accountability**



- **Don't be a "checklist manager", focus on just getting things done-done.**
- **Don't check off a project, task or activity as done until you have derived the maximum benefits from it.**
- **Take away these lessons and focus on:**
  1. **Providing quality not quantity,**
  2. **Doing it right the first time and**
  3. **Maximizing the capabilities of any solution by continuing to generate a return on your investment in the tool, process and people.**





***"Being a service leader is about positively impacting the world around you! It's not about you, it's about all that you can do to make other people successful."***

**Thank You & God Bless!**

**Pete McGarahan**

**McGarahan & Associates**

**[pete@mcgarahan.com](mailto:pete@mcgarahan.com)**

**(714) 694-1158**

