



Implementing a Customer Satisfaction Measurement Program that Drives Service Improvement!

Presented by Charles Cyna, President, ThinkITSM Corp.

Most IT organizations would agree that customer satisfaction is an important measure. However, when it comes to building a methodology to confidently measure it, there is some ambiguity about how to approach this challenge. This session will explore how an IT organization can implement a sustainable, holistic customer satisfaction measurement system that will drive service improvement.

Key Learnings:

- Understand exactly who is the 'customer' in customer satisfaction
- Why your existing customer survey could be showing an inflated satisfaction response
- Learn about the different methodologies for establishing a customer satisfaction baseline
- How to build a service improvement program around customer satisfaction
- How to design and build surveys that drive improvement!



Charles Cyna
President,
ThinkITSM Corp.

Objective

To share a proven simplified surveying methodology designed for the Service Desk and IT

To provide an opportunity to discuss what organizations that we have been working with are doing today

To provide everyone with the opportunity to move through the survey creation process associated with satisfaction measurement.

Presentation Outline

Welcome & Context

- Client Satisfaction in Context

Client Satisfaction

- What is it?
- Is it a good idea for IT to measure it?
- Reasons for low client satisfaction
- As an industry do we get inflated satisfaction scores?
- Learn how to build a survey for your stakeholder group
- Learn how to develop an action plan of improvement based on what the data is telling you

Let's Baseline

- Why do we care/do we care about client satisfaction?
- How do we capture client satisfaction information?
- Do we survey?
- Who are we surveying?
- How frequently do we survey?
- What are we doing with the information?

Client Satisfaction – Should we measure it?

Should IT/Help Desk Care about client satisfaction?

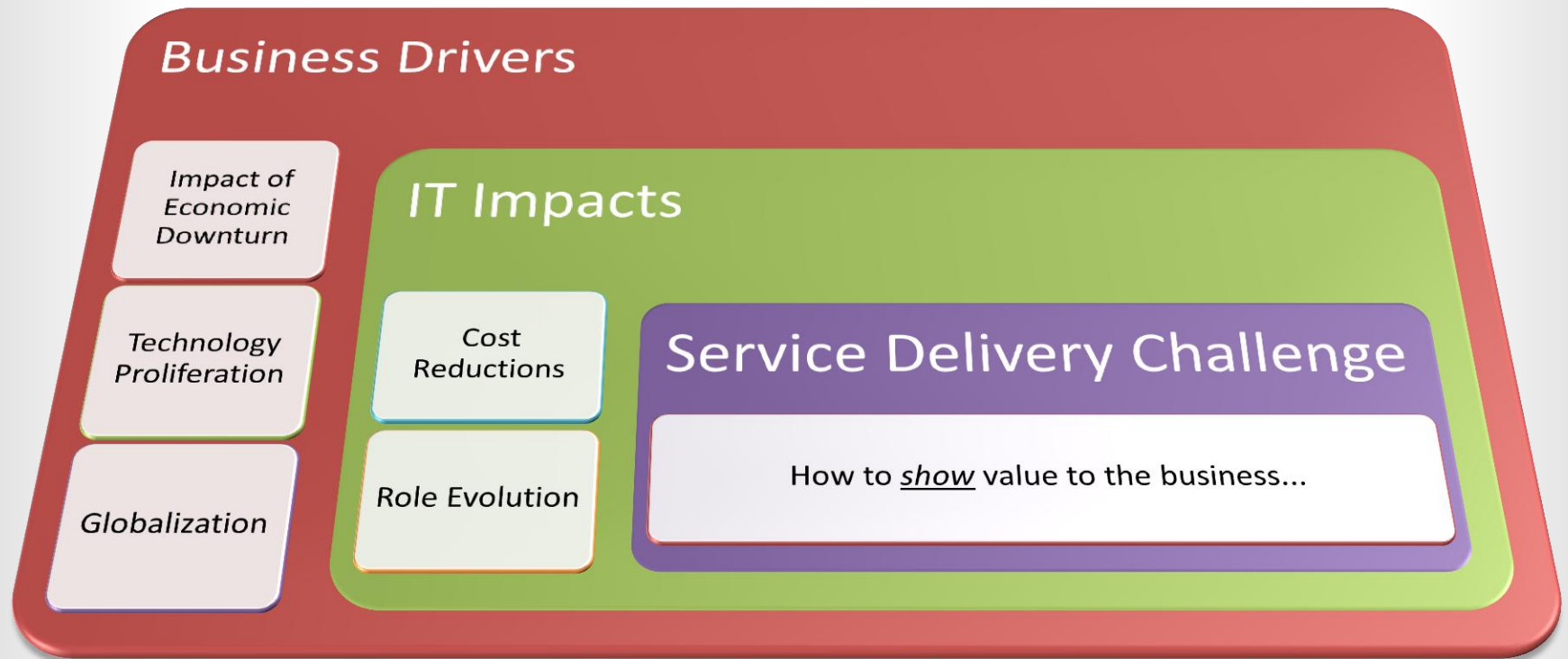
- IT is a monopoly?
- Where else are users going to go for support?
- They're not really 'customers' anyway – right?

Client Satisfaction – Should we measure it?

Client satisfaction is important because

- It maintains morale
- It improves the perception of IT within the organization
- IT is not a monopoly (not any more)
- The role of IT is changing
- It helps IT Help Desk's to move away from break/fix to other value added services.
- It feeds into the value proposition offered by the Service Desk as a key 'Service Quality' metric

Service Desk Call To Action - The BIG Picture

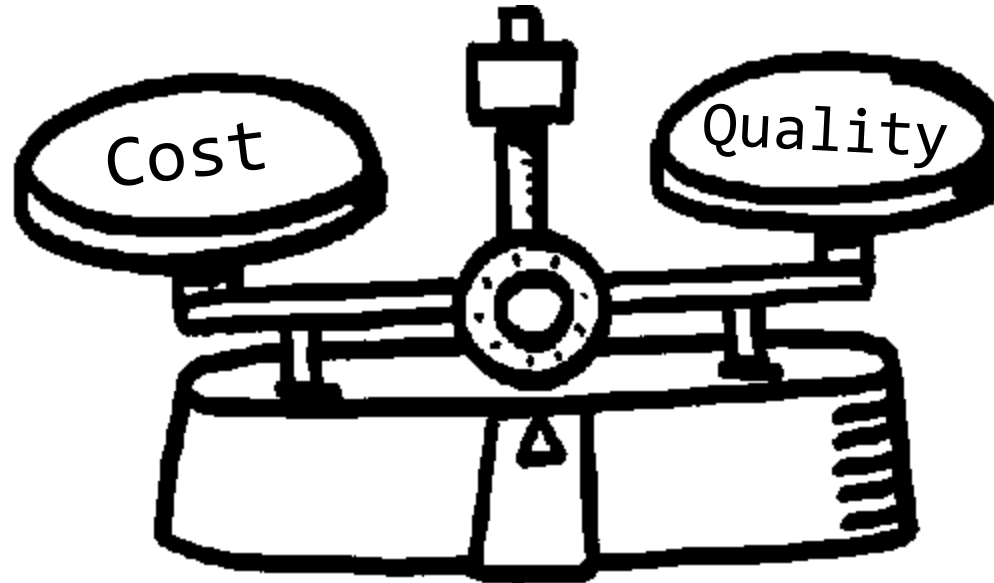


Client Satisfaction – Should we measure it?

Client satisfaction is important because

- It helps maintain organizational morale
- It improves the perception of IT within the organization
- It provides a communication channel from IT
- IT is not a monopoly (not any more)
- The role of IT is changing
- It helps IT Help Desk's to move away from break/fix to other value added services.
- It feeds into the value proposition offered by the Service Desk as a key 'Service Value' metric

Service Desk Value



Service Desk & Incident Management

VALUE Score Sheet

Used to focus Improvements & compel corrective actions to achieve targets. Results in a single VALUE score that can be used to trend improvements

	METRIC CHAMPION	Performance Metric (KPI)	Metric Weight	Confidence Rating (H,M,L)	Target Performance Range		Actual Performance	Metric Score	VALUE Score	Action Plan Ref #s
					Baseline	Target				
Quality	Smith, Jones	1. Client Satisfaction	30%	H						
	Smith	2. First Contact Resolution Rate	12%	H						
	Smith, Jones	3. Compliance to Restoration Service Level Objective (SLO)	10%	M						
Cost	Smith	4. Cost Per SD Contact	15%	M						
	Smith	5. SD & Incident Process Maturity	8%	M						
	Smith, Jones	6. Resolution Cost per Incident	5%	H						
Quality/Cost	Smith	7. Agent Utilization	10%	M						
	Jones	8. Agent Satisfaction	10%	H						
		Total	100%	N/A	N/A	N/A	N/A			

72%

Simple, focused way to monitor "How Are We Doing?"



Definition Time – What is Customer Satisfaction?

Definition	Author
An evaluation rendered that the experience was at least as good as it was supposed to be	Hunt (1977)
An evaluation that the chosen alternative is consistent with the prior beliefs with respect to that alternative	Engel and Blackwell (1982)
The consumer response to the evaluation of the perceived discrepancy between prior expectation and the actual performance of the service as perceived after its consumption.	Tse and Wilton (1988)

The Customer Service Gap

Gap 1

The Promotional Gap

- What is said about the services differs from what is delivered

Gap 2

The Understanding Gap

- Service provider perception of consumer expectation is inaccurate

Gap 3

The Procedural Gap

- Consumer expectation is not translated into appropriate procedures

Gap 4

The Behavioural Gap

- The service being delivered is different from the specification of the service

Gap 5

The Perception Gap

- The level of service perceived by consumers differs from the service actually provided

IT Client Satisfaction Challenges

- How do we make scoring objective?
- How do we make scoring relevant over time?
- Do some surveys over estimate/under estimate the satisfaction scores of recipients?
- Who should we be measuring?
- How should we be measuring?

Suggested approach

- Focus upon a goal for the processing of results
- Establish a repeatable framework
- Decide upon the stakeholder groups that will have the most impact (Consumers and Practitioners)
- Establish survey frequency (Transactional/Annual)
- Document analysis and build improvement plans around the results.

Approach

Survey setup

- Agree to a measurement model
- Identify recipients and frequency
- Perform a baseline survey

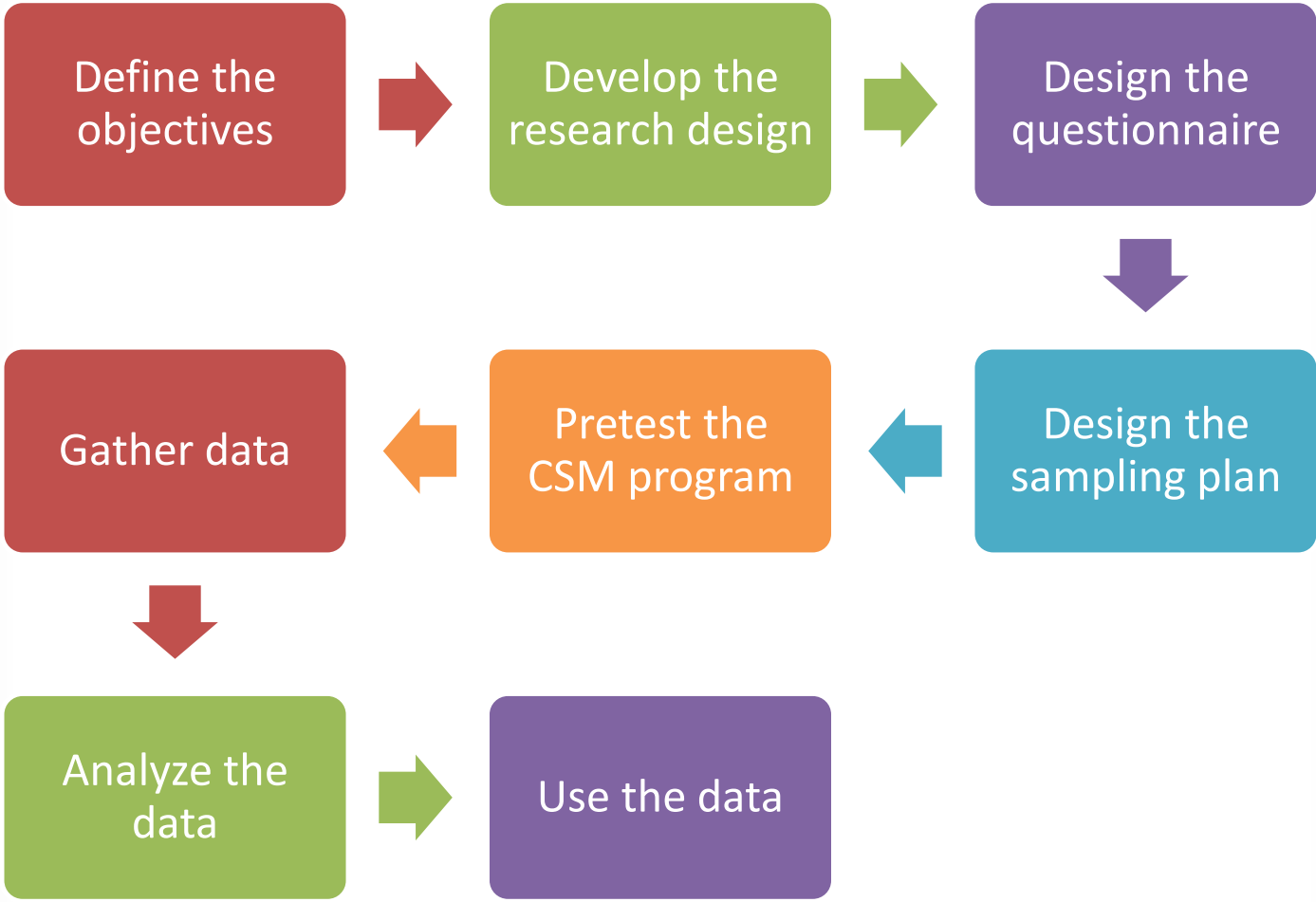
Baseline Survey Execution

- Distribute surveys and monitor performance
- Close off surveys and prepare for analysis

Survey Analysis and Reporting

- Prepare executive summary
- Close off survey and prepare for analysis

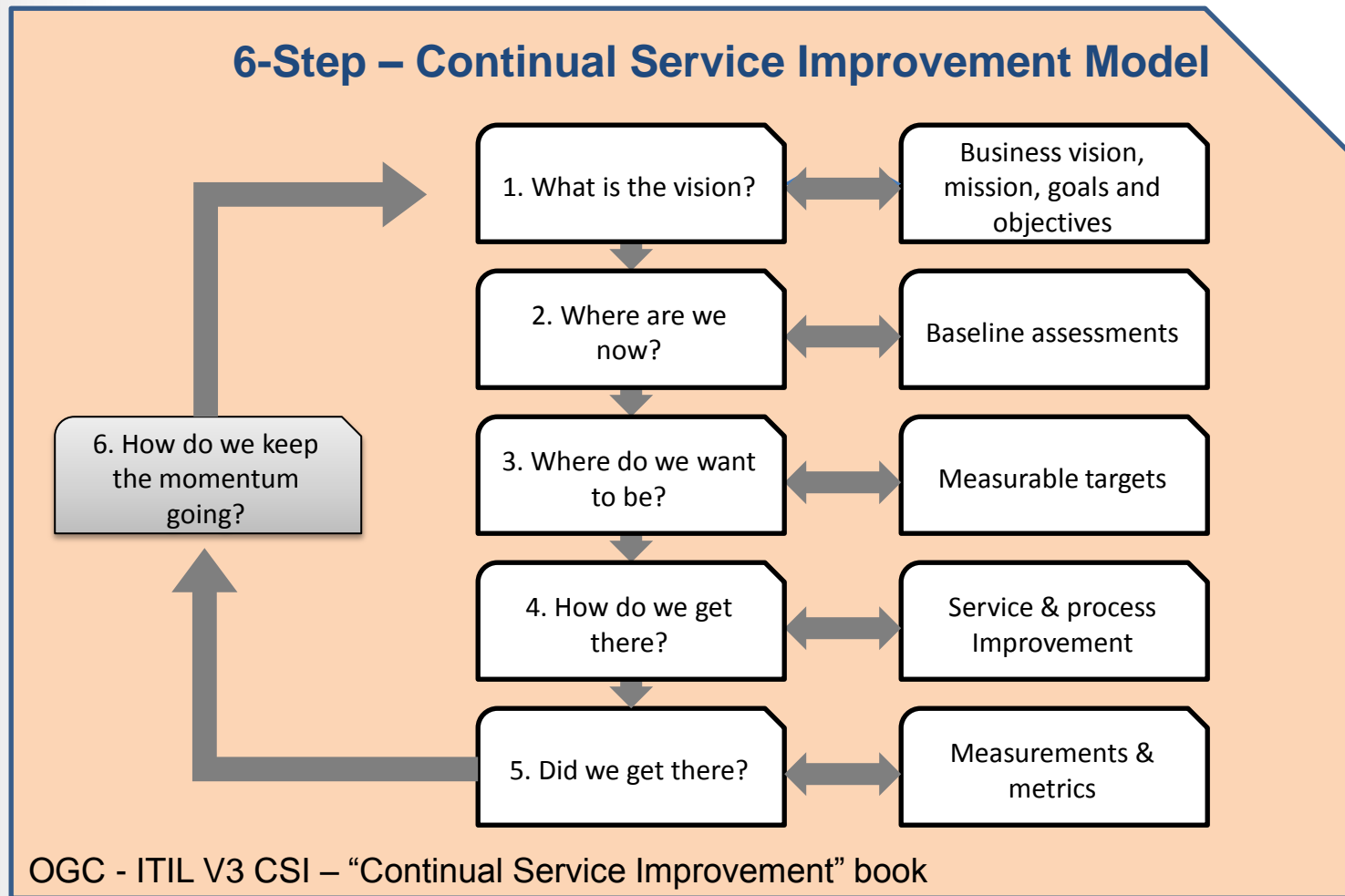
Building a customer satisfaction survey



1. Define the Objectives

- What do we want to do with the information that we gather?
 - To benchmark?
 - Know that we are doing a good job?

Getting from Here to There - The Theory



2. Develop the Research Design

- What methods are we going to use to collect the information
- How are we going to gather the information
- Who are we going to gather the information from

Satisfaction Data Collections Mechanisms

Research

- Surveys
- ‘Mystery Shoppers’
- Consumer visits/Focus Groups

Operational Data

- Incident/SR Analysis
- Re-opened issues
- Metrics (MTRS/SLO/FPOC)

Key satisfaction measurement Stakeholders

- ✓ Consumers
- ✓ IT Practitioners (Service Desk and Escalation Groups)
- ✓ Executives (IT and Business)

Survey Structure Aligned with CSI

Consumers

Transactional

Solved at FPOC

Escalated

Service Request

Overall Perception

Called the Service Desk

Have not called the
Service Desk

IT

Overall Perception

Front Line Service Desk

Escalation Group

Support

Transactional

Low client satisfaction

Executives

Overall Perception

State of IT

Survey Starting Point

Survey Type	Audience	Comments
Client Satisfaction Survey (Baseline)	<p>Users of the ISB Support Services</p> <ul style="list-style-type: none"> This survey baselines the Consumers' perception and importance rating of the Service Desk & support services. It is performed as part of an annual baseline activity to inform Service Improvement Plans (SIPs) 	<p>Broken down into groups:</p> <ul style="list-style-type: none"> Specific business areas Regions
Client Satisfaction Survey (Checkpoint)	<p>Users of the ISB Support Services</p> <ul style="list-style-type: none"> This survey is a shorter version of the Baseline survey and is performed immediately following the service support activity. Provides immediate satisfaction/importance information on key dimensions 	<p>Broken down into groups:</p> <ul style="list-style-type: none"> Specific business areas Regions <p>May also include call-backs and/or warm call transfers</p>
IT Practitioner Satisfaction Survey (Baseline)	<p>Providers of the IT Support Services</p> <ul style="list-style-type: none"> This survey baselines the IT Practitioners' perception and importance rating of the Service desk and incident management practice that is critical to the success of their support activities. It is performed as part of an annual baseline activity to inform Service Improvement Plans (SIPs) 	<p>Broken down into groups:</p> <ul style="list-style-type: none"> Specific Support Groups Support Locations Etc
IT Practitioner Satisfaction Survey (Checkpoint)	<p>Providers of the IT Support Services</p> <ul style="list-style-type: none"> This survey is a shorter version of the Baseline Survey and is performed at set intervals (i.e., quarterly or scheduled after completion of targeted improvement activities to gauge results of improvement 	<p>Broken down into groups:</p> <ul style="list-style-type: none"> Specific Support Groups Support Locations Etc

Design the question

Rating Satisfaction

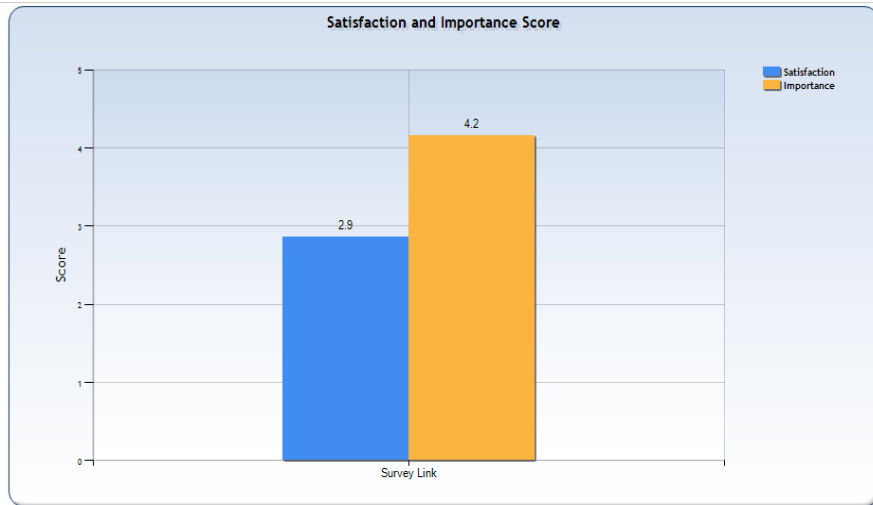
Rating Importance

Example:

Rate the timeliness of the resolution to your question?

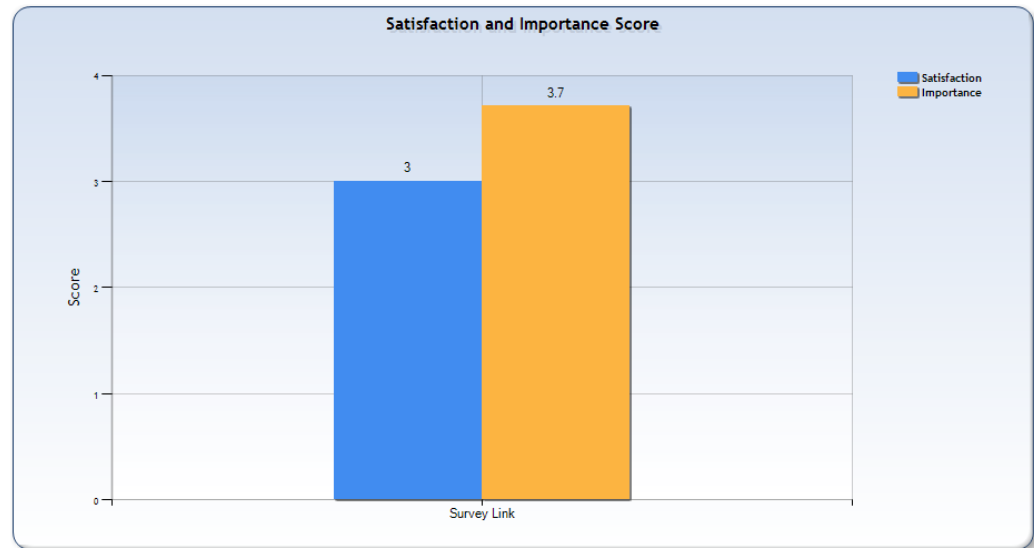
	Low				High
Satisfaction:	1	2	3	4	5
Importance:	1	2	3	4	5

Total Satisfaction and Importance Scoring



Satisfaction of IT Service Desk Team - **Note the lower satisfaction scores**

Satisfaction of IT Groups (Non Service Desk). **Note the lower importance scores**



Survey Dimensions - TRRACC

Timeliness

Reliability

Responsiveness

Accessibility

Communication

Cost and Value

Dimensions - Timeliness

Providing Service/Practice delivery interactions that occur at an appropriate or fitting time

- Timely delivery of service
- Waiting time for action

Dimensions - Reliability

Providing what was promised, consistently and correctly

- Provided needed service
- Provided what was promised
- Adhered to policy and standards
- Minimal error rate
- Consistency

Dimensions - Responsiveness

Reacting readily to the Customers/IT Practitioners needs and appeals

- Streamlined service delivery design
- Timely reaction to expressed concerns
- Service delivery staff are:
 - Considerate, Understanding, Helpful, Knowledgeable, Informative, Innovative, Reasonable, Confidential

Dimensions - Accessibility

Providing service/practice interactions with simplicity and openness

- Hours of service
- Customer choice
- Automated for efficiency, simplified processing
- Intelligent (service has a customer memory)

Dimensions - Communication

Providing accurate, understandable, relevant information and an actionable voice for the Customer/IT Practitioner

- Requests are answered
- Availability of information
- Clear, understandable language
- Consistent information/advice

Dimensions – Cost and Value

Suitability of user fees and delivery/demonstration of value

- Transparent & reasonable cost
- Traceability of costs to service/practice
- Value for expense

Scored broken down by 'Dimension'



Source: ITSM Coach

Overall Ranking Questions

To aid the objective around improvement ask clearly what we should be doing to improve?

Overall Ranking Questions

[Dimension Options](#) | [Add a Question](#)

Top 3 Satisfaction Concerns



H1. Of the questions included in this survey, please rate the 3 top areas where you would like to see improvement. (Rating of 1 to 3, with 1 being the most important area to focus improvements).

[Comments](#)

- Availability of the Service Desk when expected.
- Prompt Service Desk response to inquiries without unnecessary delay.
- Overall rating of the timeliness of interactions with the Service Desk.
- Ability of Service Desk to resolve my inquiry or refer it to appropriate resource.
- Consistency and reliability of Service Desk information.

Source: ITSM Coach

Ranking Question Analysis

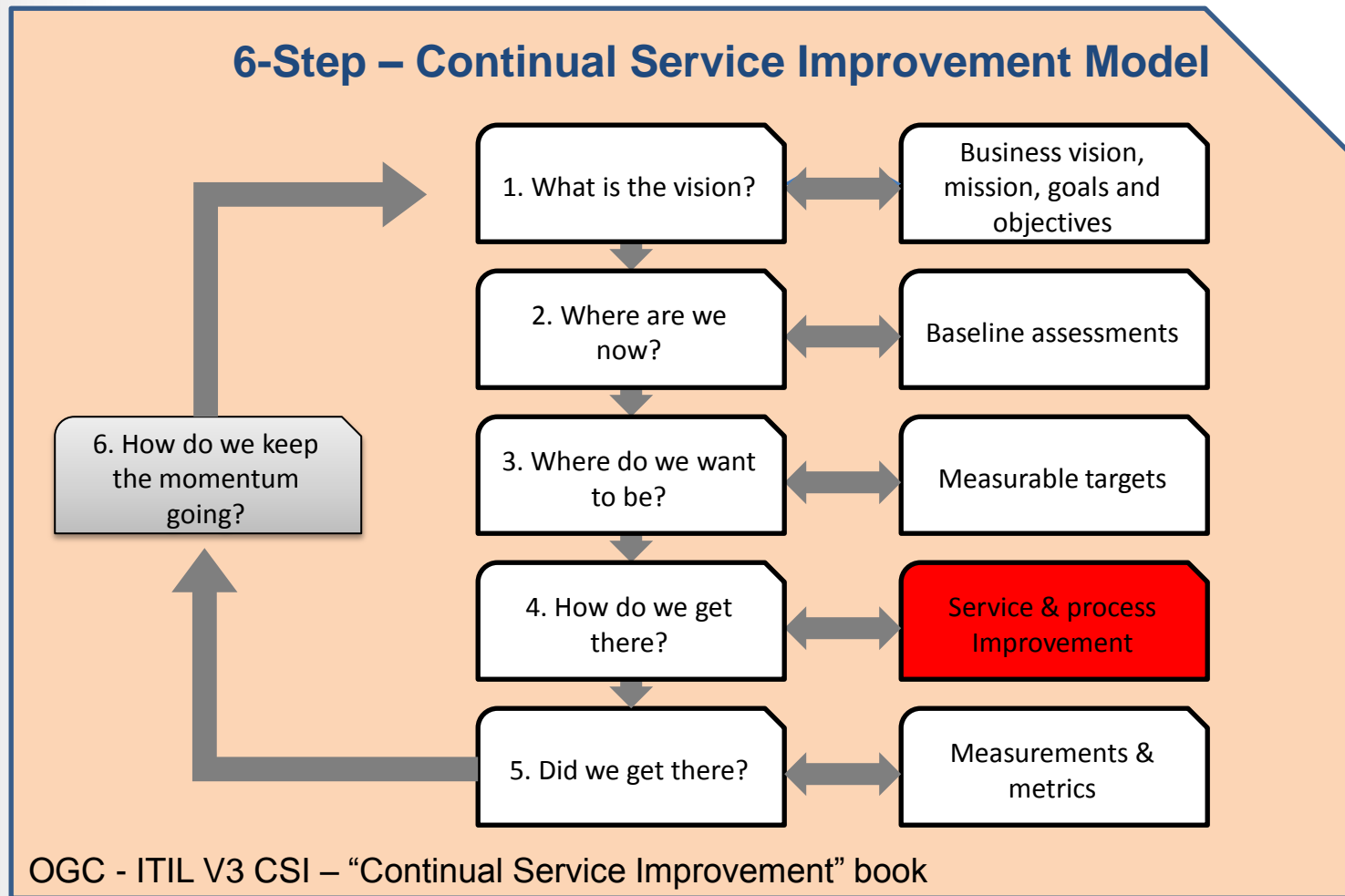
Top 3 improvements as identified by the Service Desk Team

Top 3 Satisfaction Concerns		
Rank	%	Issue
1	62.5%	Accuracy and detail of individual incident information when it is updated by IT groups external to the Service Desk.
2	50.0%	Sufficient lead-time of support documentation and training for newly-supported services/applications.
3	37.5%	Cooperativeness, professionalism and customer service focus of other support groups.

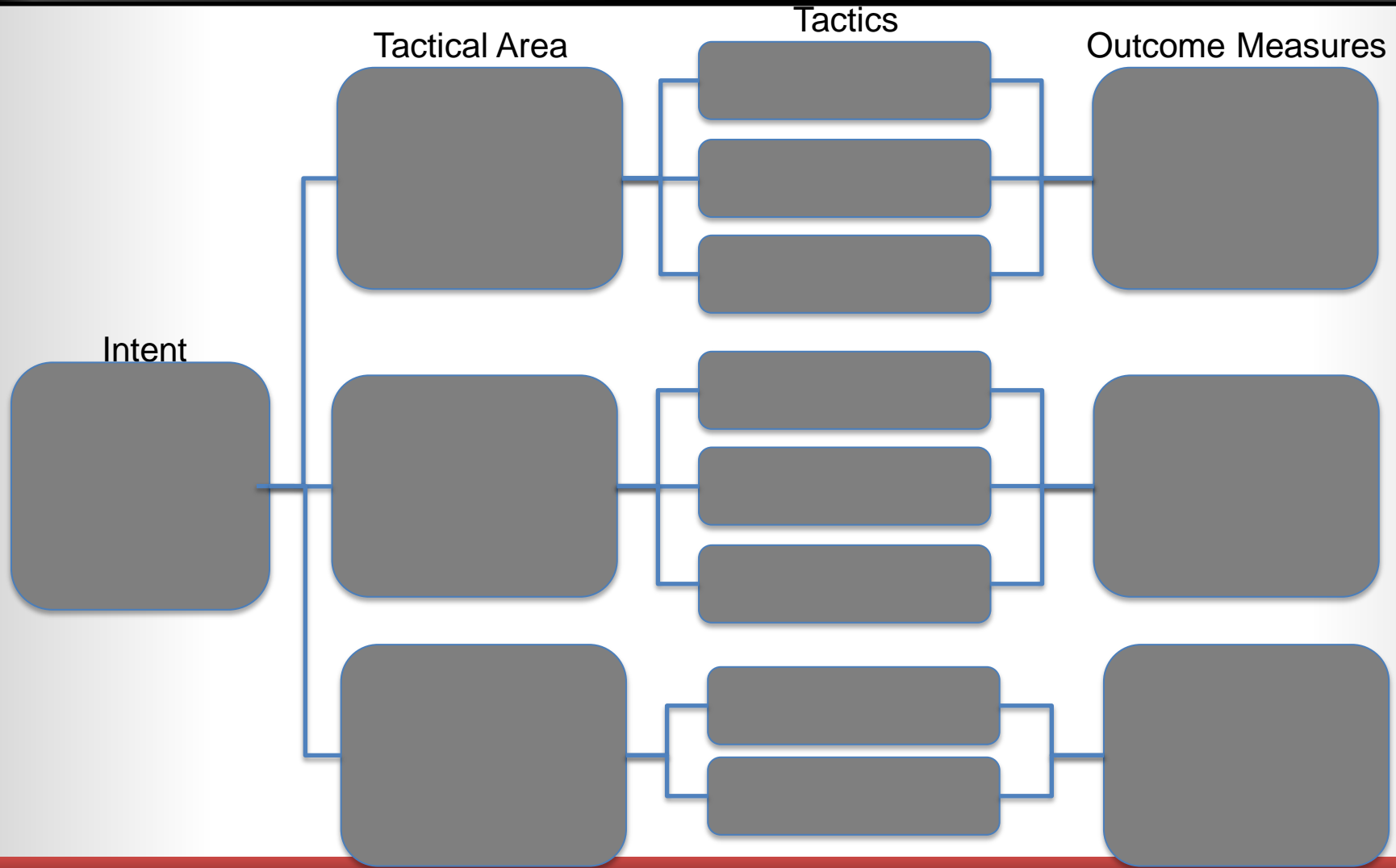
Top 3 improvement as identified by Escalation Groups

Top 3 Satisfaction Concerns		
Rank	%	Issue
1	61.1%	Accuracy and detail of individual incident information provided by the Service Desk
2	38.9%	Well defined incident process with smooth hand-offs between support groups.
3	29.6%	Usefulness of incident coding in prioritizing support activities.

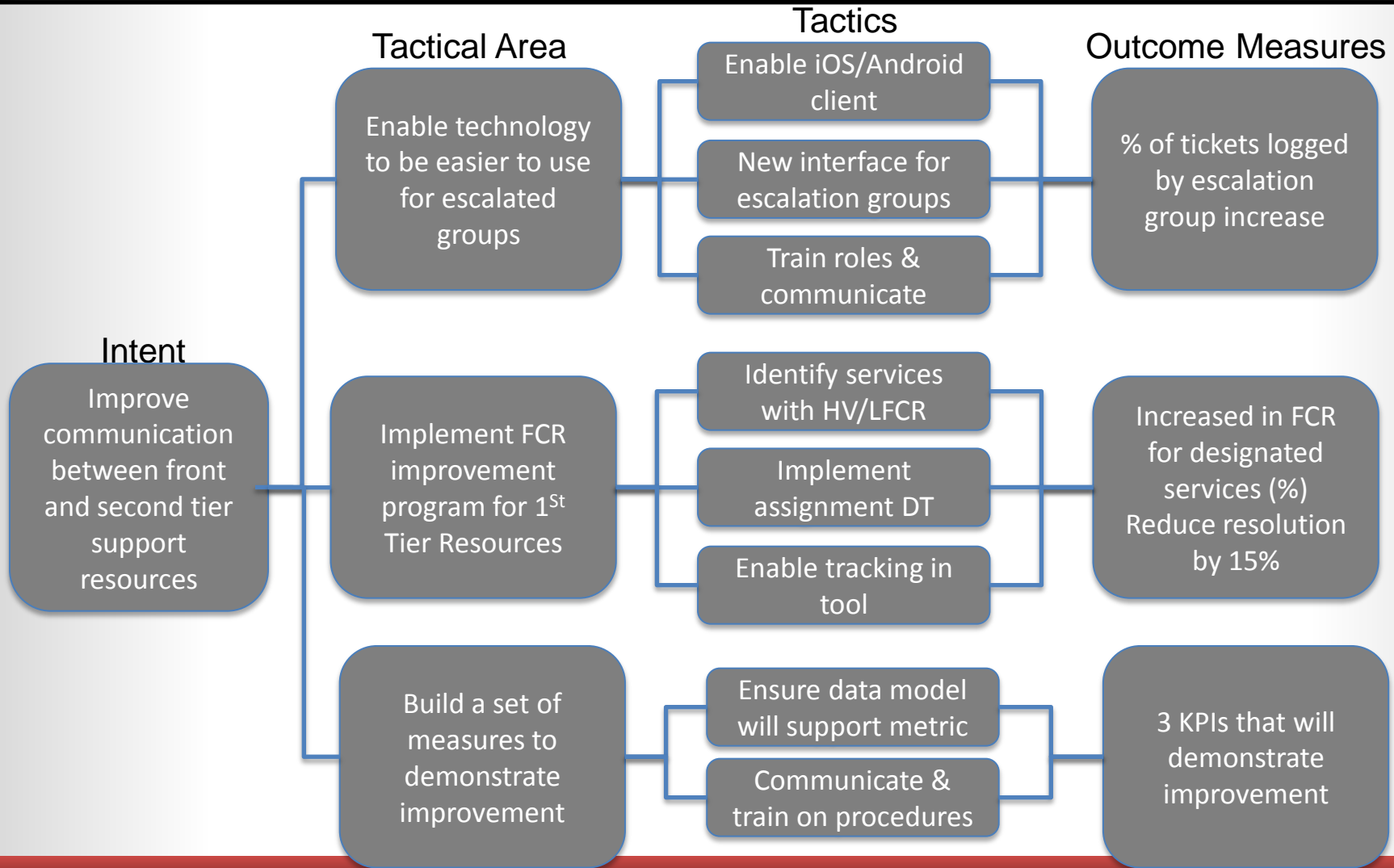
Getting from Here to There - The Theory



Tactical Tree



Example Tactical Tree



Summary

- Implement customer satisfaction measurement around a methodology
- Be careful not to ask questions that are not relevant to YOUR goals
- Use multiple data gathering techniques so results are not artificially inflated
- Use client satisfaction results as part of a CSI program as opposed to looking for satisfaction as a measure in itself
- Spend time focusing on how you are going to action the information (not just on the design and collection).
- Don't be afraid to communicate results back to the stakeholders and share improvements/actions

Actionable next steps...

Access example survey questions by visiting

<http://www.thinkitsm.com/thoughtrock>

1

All fields are required.

First Name

Last Name

Company

Country

ZIP/Postal Code

Phone Number

Email

Confirm Email

Password

Confirm Password

Time Zone

Security Phrase

MIDDLE

haReport

Type the words above

Continue

2

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Define Measure /

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Navigate to...

Manage Your Practice

Surveys

Practice Satisfaction Business Consumer

Practice Satisfaction IT Practitioner

Executive Satisfaction

Surveys

Maturity Assessments

Service Desk & Incident Mgmt.

Problem Management

Change Management

Practice Dashboards

Monitor Service Desk Performance

Monitor Problem Performance

Monitor Change Performance

KPI Target Setting

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to download a PDF copy of
Guide'.

The **Help** tab on the bott
screen within ITSM Coach
specific help to guide you 1
Practice Management Acti

My Tasks

- * Refresh Your Service Incident Manager Maturity (50%)
- * Refresh Your Problem Practice Maturity (0%)
- * Refresh Your Change Practice Maturity (50)
- * Baseline Executive S (0%)
- * Baseline Practice Sa Practitioner Step (75)
- * Baseline Practice Sa Business Consumer 5

Questions? Comments?



Thank You For Attending The Webcast!

Please take a moment to answer the quick survey after you exit the webcast. Your feedback is extremely valuable to us.

We'd Love To Hear From You!

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