

Incident Management Metrics – A University of Miami Case Study

We live our whole lives being measured. Many measurements are subjective which can lead to differences of opinion. Measurement is important, because it puts vague concepts into context. It is not enough to say you want to deliver quality service, but you must define what it means to know if you are succeeding.

Eddie Vidal will introduce the tools, templates and samples on grading and ranking your Help Desk Analysts in 8 different categories he implemented at the University of Miami.

Key Learning Objectives:

- Keeping it simple, measurements to get you started
- Importance of obtaining analyst buy-in
- Creating a professional development program
- Useful information, why it's important to use metrics



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Manager Enterprise
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Incident Management Metrics

A University of Miami Case Study

Eddie Vidal

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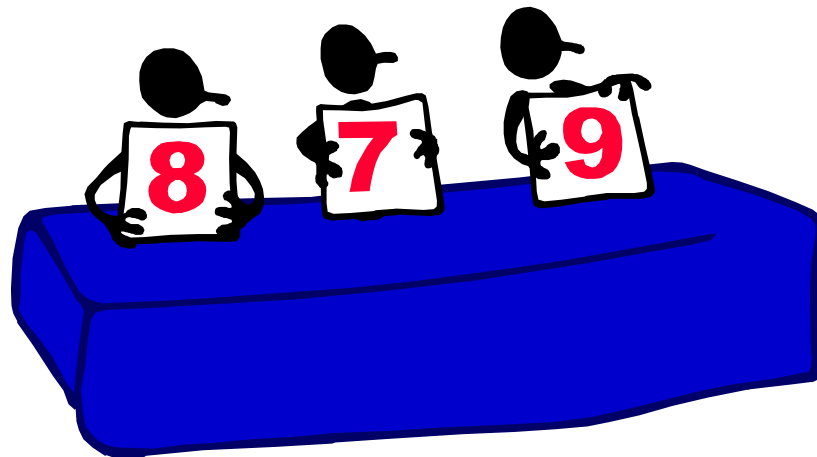
January 31, 2012

UNIVERSITY
OF MIAMI
INFORMATION TECHNOLOGY



Objectives

- UM Approach – Keeping it simple
- Useful information – Why it's important to use metrics.
- Obtain Buy-in
- Create Professional Development Program



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

Family



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

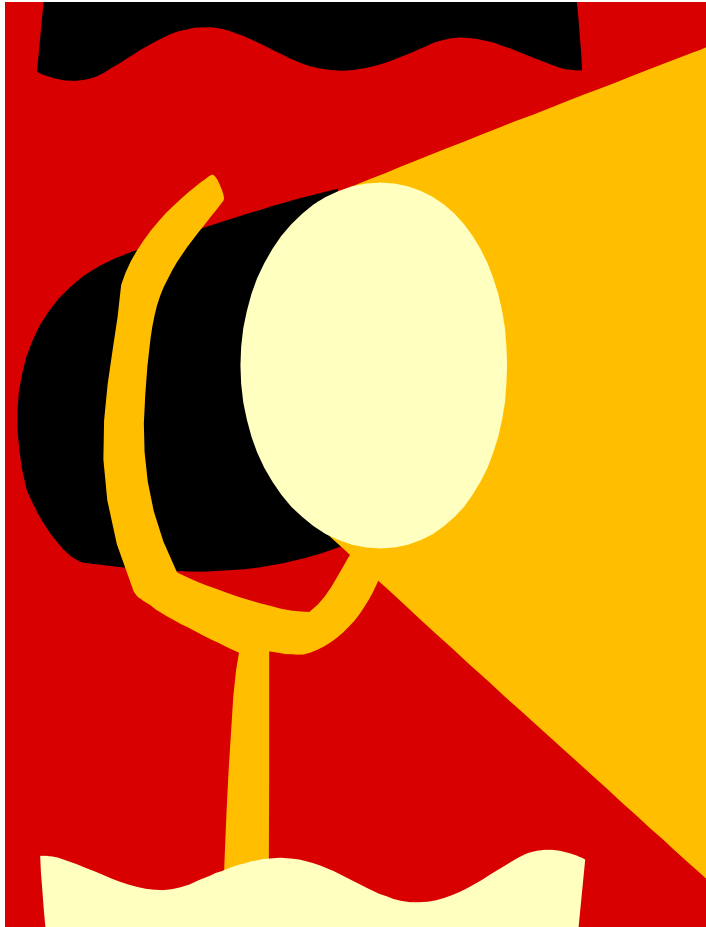
Print Name

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 – Compcoco 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?

1. Call Monitoring 15%
2. Incident Tracking 15%
3. Average Talk Time 10%
4. Percent Available/Logged in Time 10%
5. First Call Resolution 10%
6. Percent of Service Requests Entered 15%
7. Percent of Team Calls Answered 10%
8. Service Request/Incident Tracking Accuracy 15%



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?

Service Requests/Incident Accuracy

- Weight 15%
- Goal 95% accuracy
- Criteria used for grading
 - Location
 - Location
 - Location

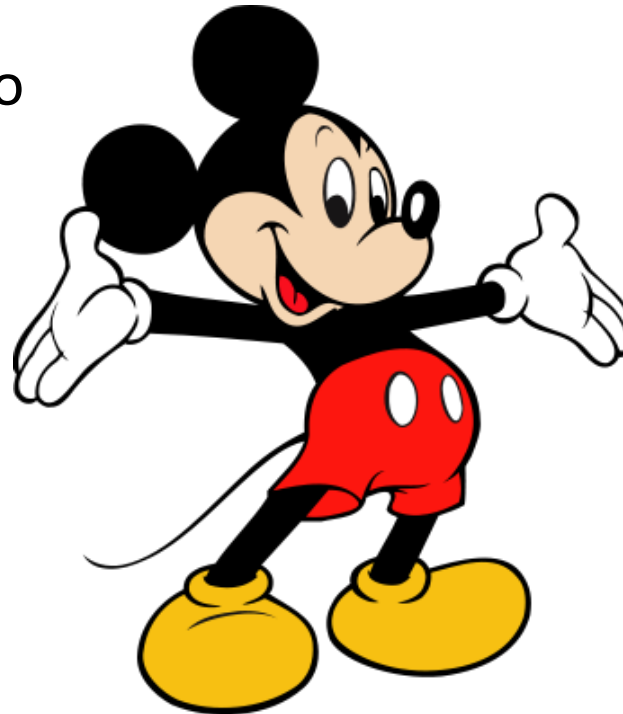


Service Request/Incident Tracking Accuracy

- 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

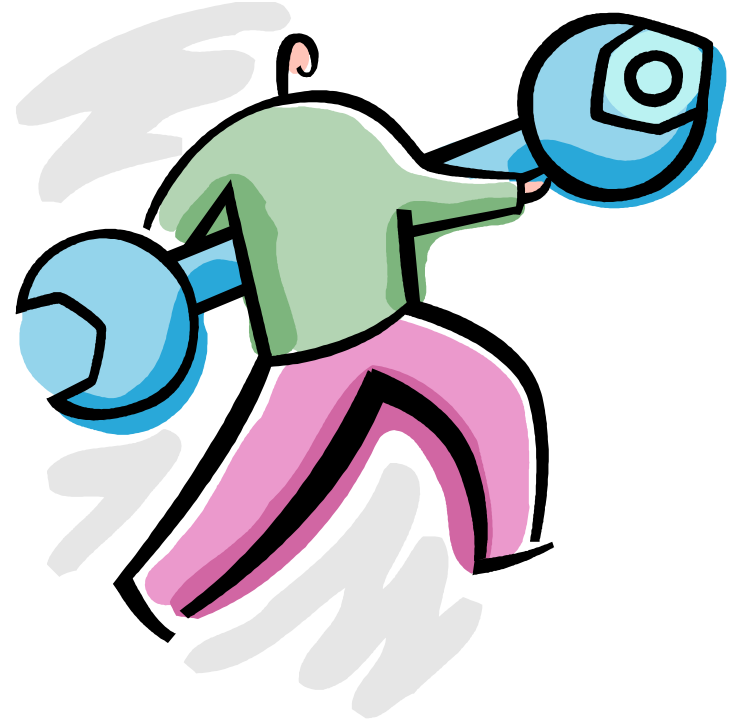


Percent of Calls Answered

- Are users calling published number?
- Do you have one Analyst answering most of the calls?



Percent of Service Requests Entered



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%



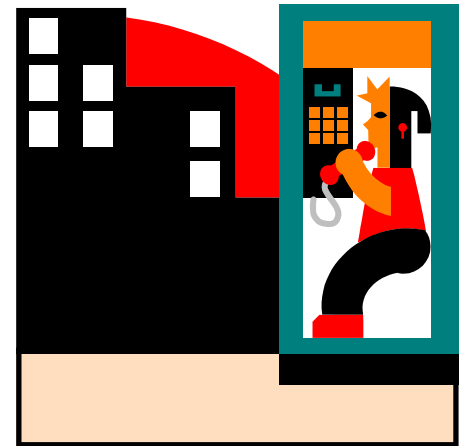
Percent Available Time

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



Average Talk Time

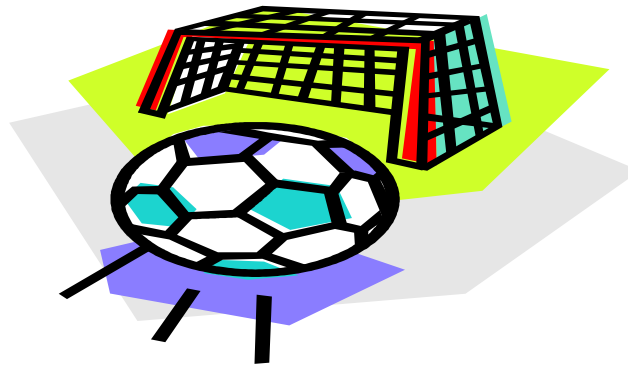
- Average talk time per analyst
 - Average time an analyst spends talking to a customer on each call
 - Used to determine staffing and training needs
- Weight 10%
- Goal 5 minutes
 - 5 minutes or less 10 points
 - 5 minutes or over 0 points



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



Greeting the Customer

Introduce yourself

Name²



How may I help you

Key Points During the Call

ID Customer Dept

Verify Address

Verify Phone Number

Verify Tracking #

Summarize Call

Plan of Action

Timeline for Resolution

Provide Tracking #

Transferring Calls

Placing on Hold

Ending the Call

Offer further assistance

Thank customer for calling

Encourage future calls

End call on positive note

Allow customer to have last word

Behavioral Questions

Answered all caller's questions

Attitude positive and friendly

Speak audibly and clearly

Apologize for inconveniences caused

Courteous and empathetic

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 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
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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	<i>Based on 5 employees</i> > 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%	% 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	Must average less than 5 minutes to earn all 10 points	<i>Based on 5 employees</i> > 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

	<u>Score</u>	<u>Calls Answered</u>	<u>Availability</u>	<u>Avg Talk Time</u>	<u>% Team Answered</u>	<u>Tickets Entered</u>	<u>% Calls Logged</u>	<u>1st Call Resolution</u>	<u>Orders Entered</u>	<u>% Orders Entered</u>	<u>Agents Available</u>	<u>WO and TT Accuracy</u>	<u>Call Monitoring</u>
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
 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			Answer Time			Abandon Time			Call Tracking		
Total Calls Received 193			Total Calls Answered 192			Total Calls Abandoned 1			Total Calls Answered 192		
Metric	Total	%	Metric	Total	%	Metric	Total	%	Metric	Total	%
Answered	192	99.5	Avg Speed to Answer	00:08	seconds	Avg Abandon Delay	00:00:01	seconds	Tickets Opened	96	50
Abandoned	1	0.52	In 30 seconds or Less	187	97	15 seconds or less	1	100	Closed	74	77
Abandoned (AT)	0	0.00	31 to 60 seconds	5	3	16 to 30 Seconds	0	0	New	22	22
			Average Talk Time	02:07	minutes	31 to 60 Seconds	0	0	Closed Same Day	74	77
			Agents Available	6	100.0	61 Seconds or More	0	0	First Contact Resolution	52	54

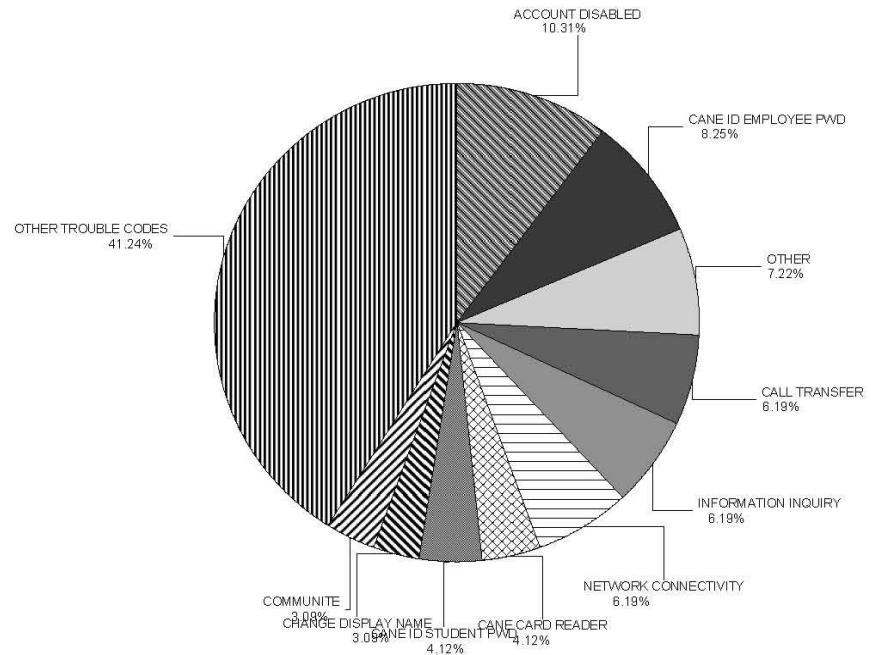
Tickets Aging		<i>as of 8/9/2010</i>	
Total Tickets Open		231	
Metric	Total	%	
0 to 24 hours	23	9%	
48 to 96 hours	15	6%	
96 to 120 hours	2	0%	
More than 120 hours	191	82%	

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

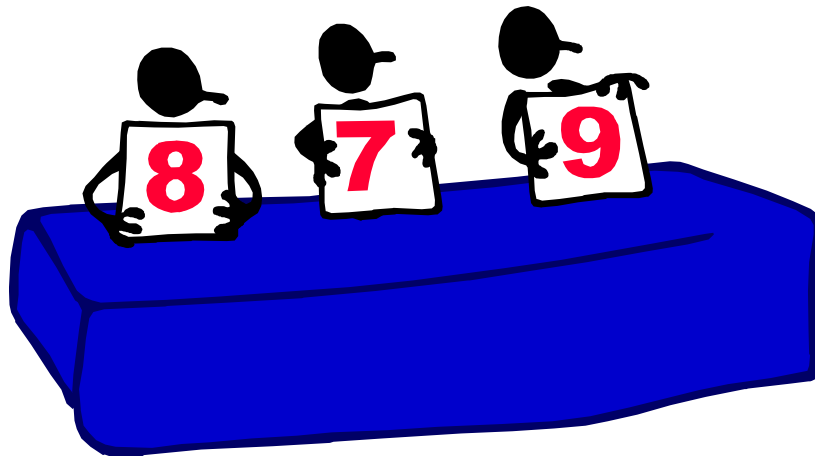
Work Order Entry Summary			<i>entered 8/9/10</i>		
Gables	Medical	Total			
13	4	17			

Top 10 Trouble Codes

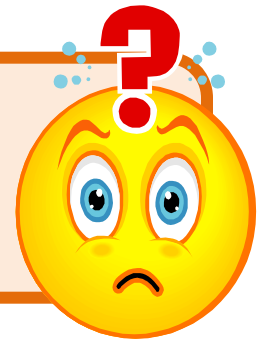


Three Takeaways

- ✓ UM Approach – Keeping it simple
- ✓ Useful information – Why it's important to use metrics.
- ✓ What we have gained – can you apply it to your job?



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We'd Love To Hear From You!

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