

## 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 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 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?

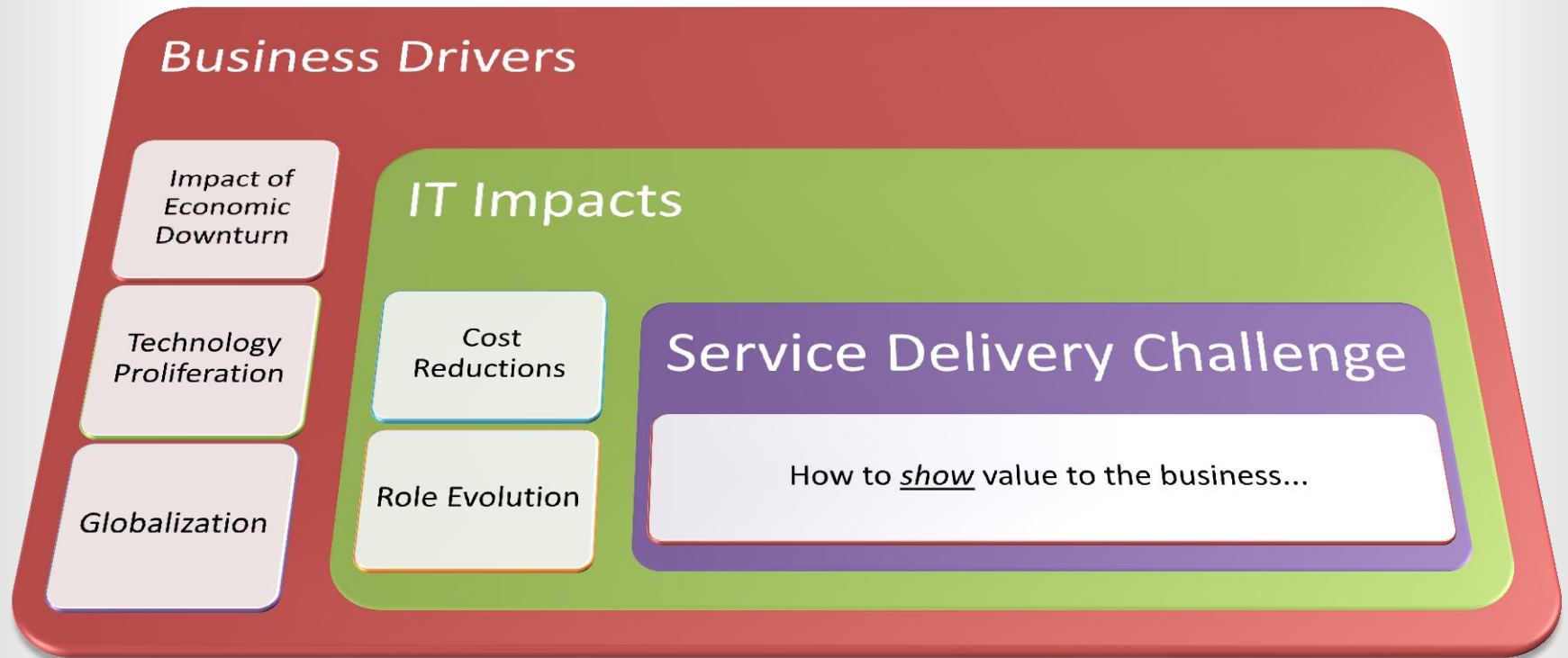
- IT is a monopoly?
- Where else are users going to go for support?
- They're not really 'customers' anyway – right?

# 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)
- IT's role is changing
- It help 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



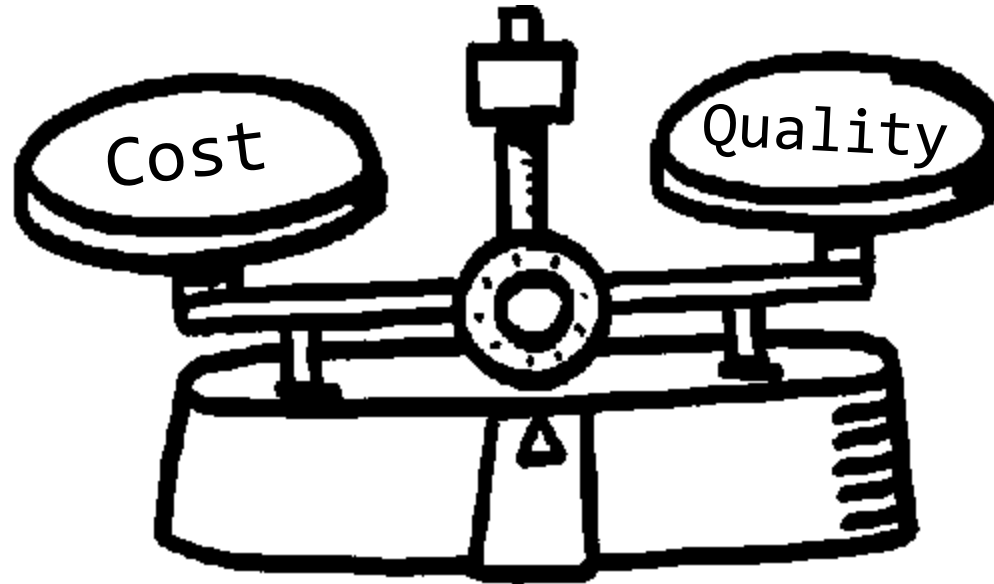
# Client Satisfaction – Should we measure it?

Client satisfaction is important because

- It help 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)
- IT's role is changing
- It help 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

- Providers perceptions of consumer's expectations are inaccurate

## Gap 3

### The Procedural Gap

- Consumers expectations are not translated into appropriate procedures

## Gap 4

### The Behavioral 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 form 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

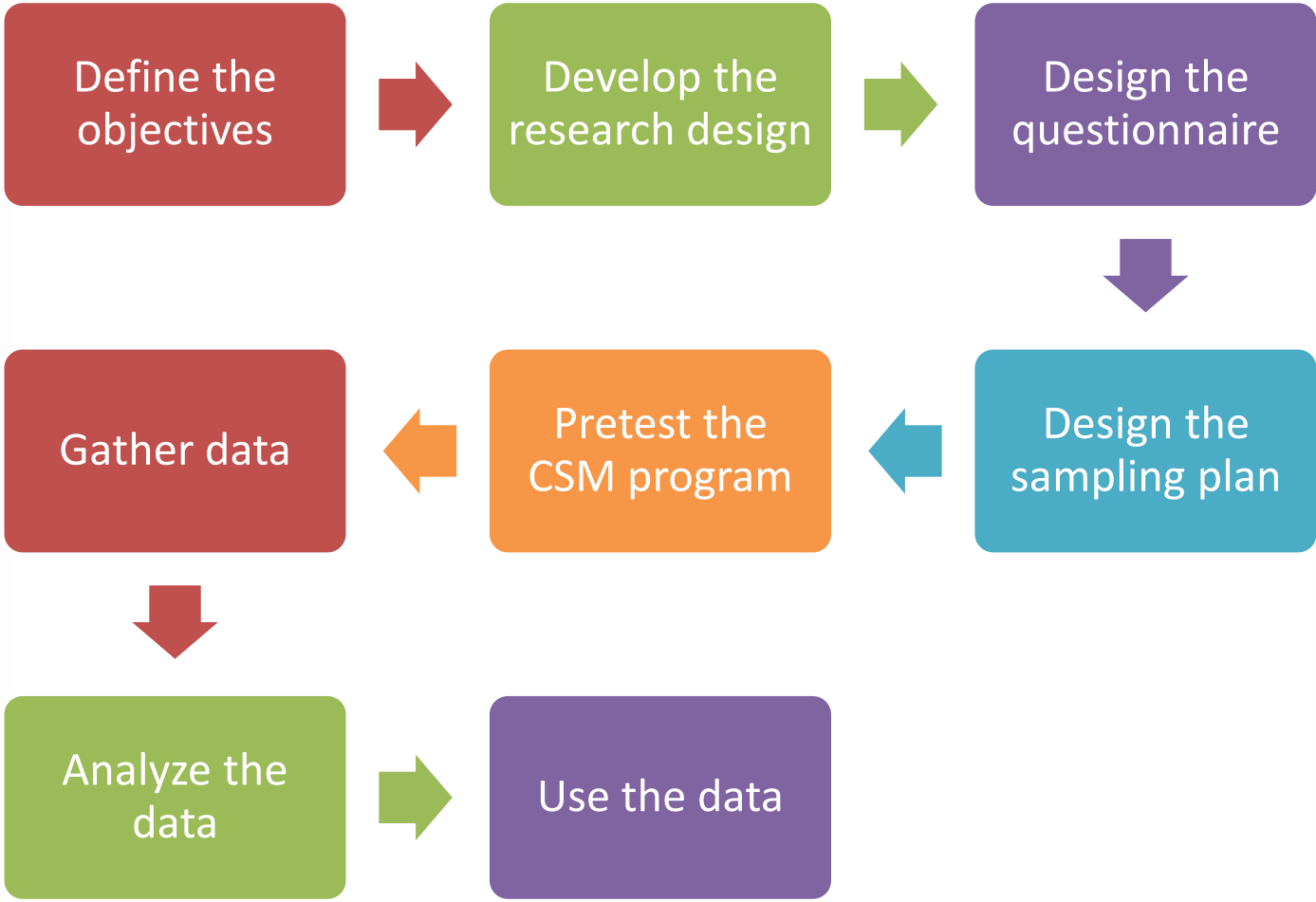
## Baseline Survey Execution

- 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



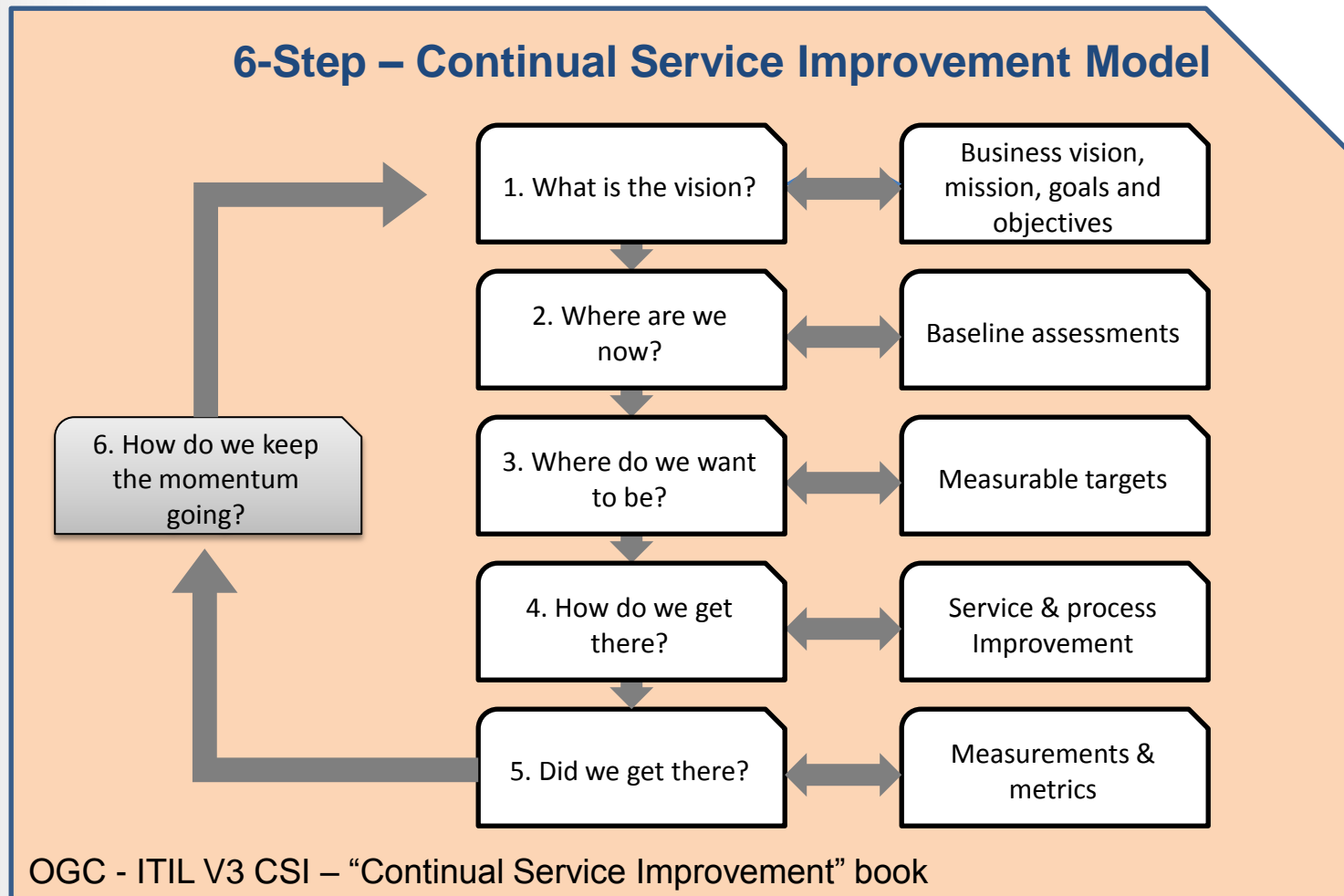


# 1. Define the Objectives

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- What do we want to do with the information that we gather?
  - Benchmarking?
  - Knowing that we are going a good job?

# Getting from Here to There - The Theory



## 2. Develop the Research Design

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- 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

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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"> <li>This survey baselines the Consumers' perception and importance rating of the Service Desk &amp; support services. It is performed as part of an annual baseline activity to inform Service Improvement Plans (SIPs)</li> </ul>   | <p>Broken down into groups:</p> <ul style="list-style-type: none"> <li>Specific business areas</li> <li>Regions</li> </ul>   |
| Client Satisfaction Survey (Checkpoint)          | <p>Users of the ISB Support Services</p> <ul style="list-style-type: none"> <li>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</li> </ul>   | <p>Broken down into groups:</p> <ul style="list-style-type: none"> <li>Specific business areas</li> <li>Regions</li> </ul> <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"> <li>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)</li> </ul> | <p>Broken down into groups:</p> <ul style="list-style-type: none"> <li>Specific Support Groups</li> <li>Support Locations</li> <li>Etc</li> </ul>  |
| IT Practitioner Satisfaction Survey (Checkpoint) | <p>Providers of the IT Support Services</p> <ul style="list-style-type: none"> <li>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</li> </ul>  | <p>Broken down into groups:</p> <ul style="list-style-type: none"> <li>Specific Support Groups</li> <li>Support Locations</li> <li>Etc</li> </ul>  |

# Design the question

Rating Satisfaction

Rating Importance

Example:

**Rate the timeliness of the resolution to your question?**

|                      | Least    |          |          | Most     |          |
|----------------------|----------|----------|----------|----------|----------|
| <b>Satisfaction:</b> | <b>1</b> | <b>2</b> | <b>3</b> | <b>4</b> | <b>5</b> |
| <b>Importance:</b>   | <b>1</b> | <b>2</b> | <b>3</b> | <b>4</b> | <b>5</b> |

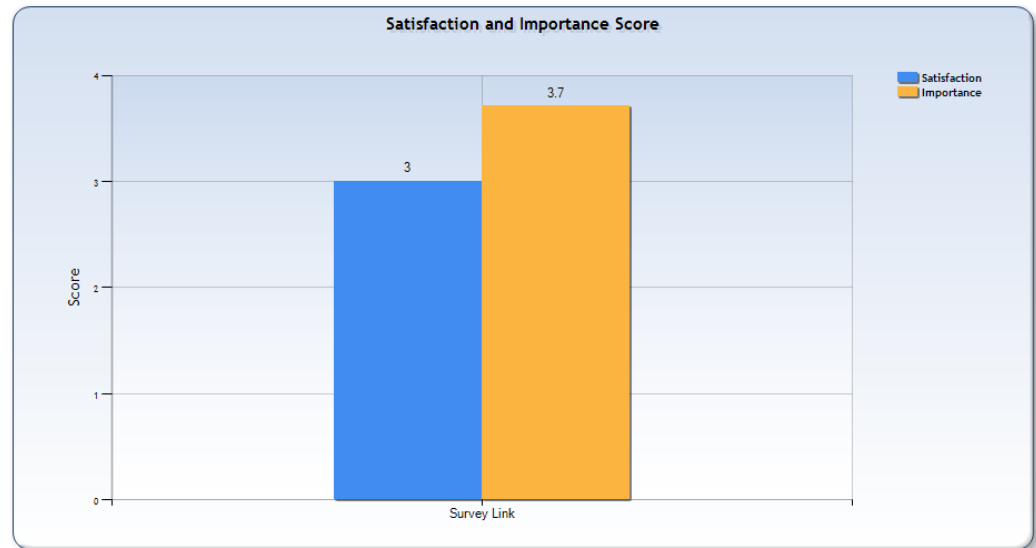


# Total Satisfaction and Importance Scoring



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

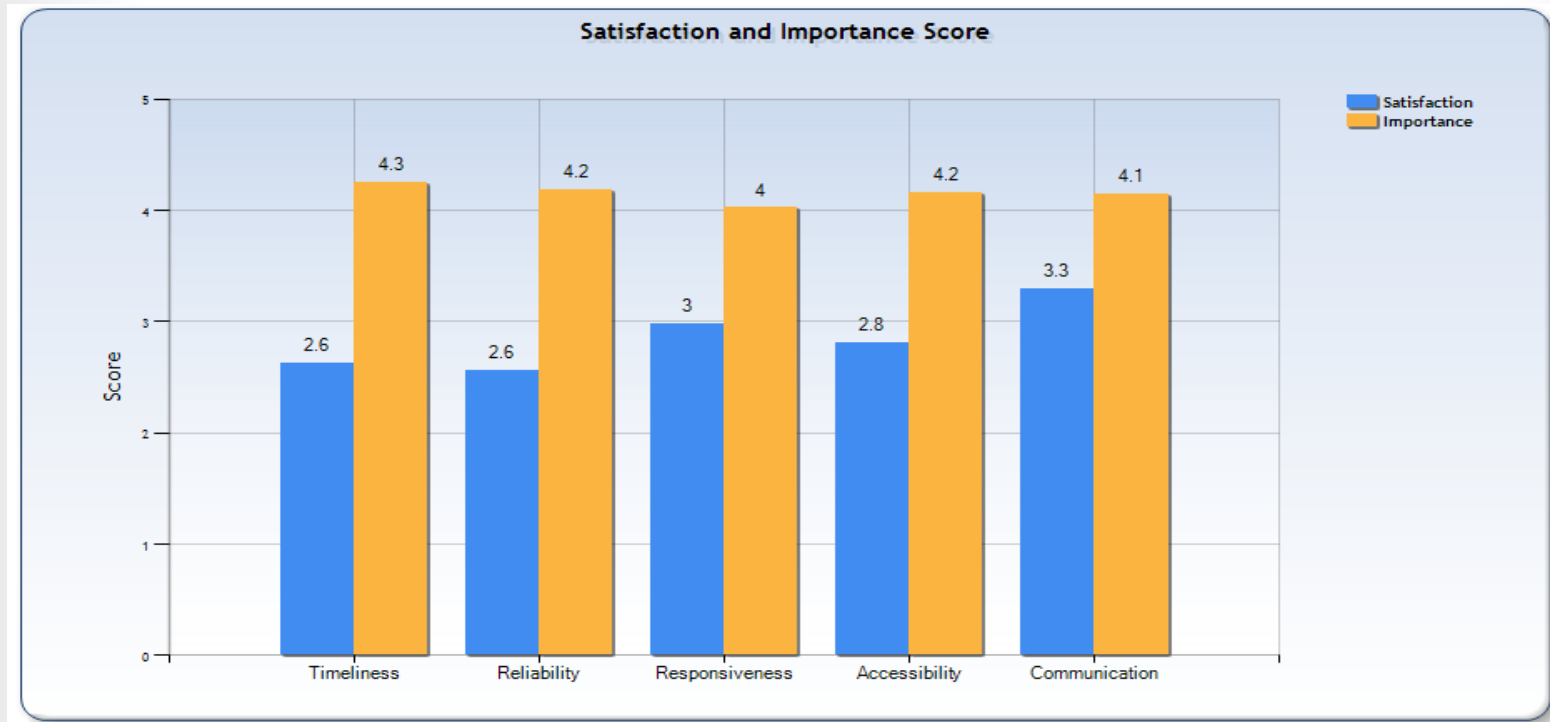
# Dimensions – Cost and Value

## *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'



# 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.

# Ranking Question Analysis

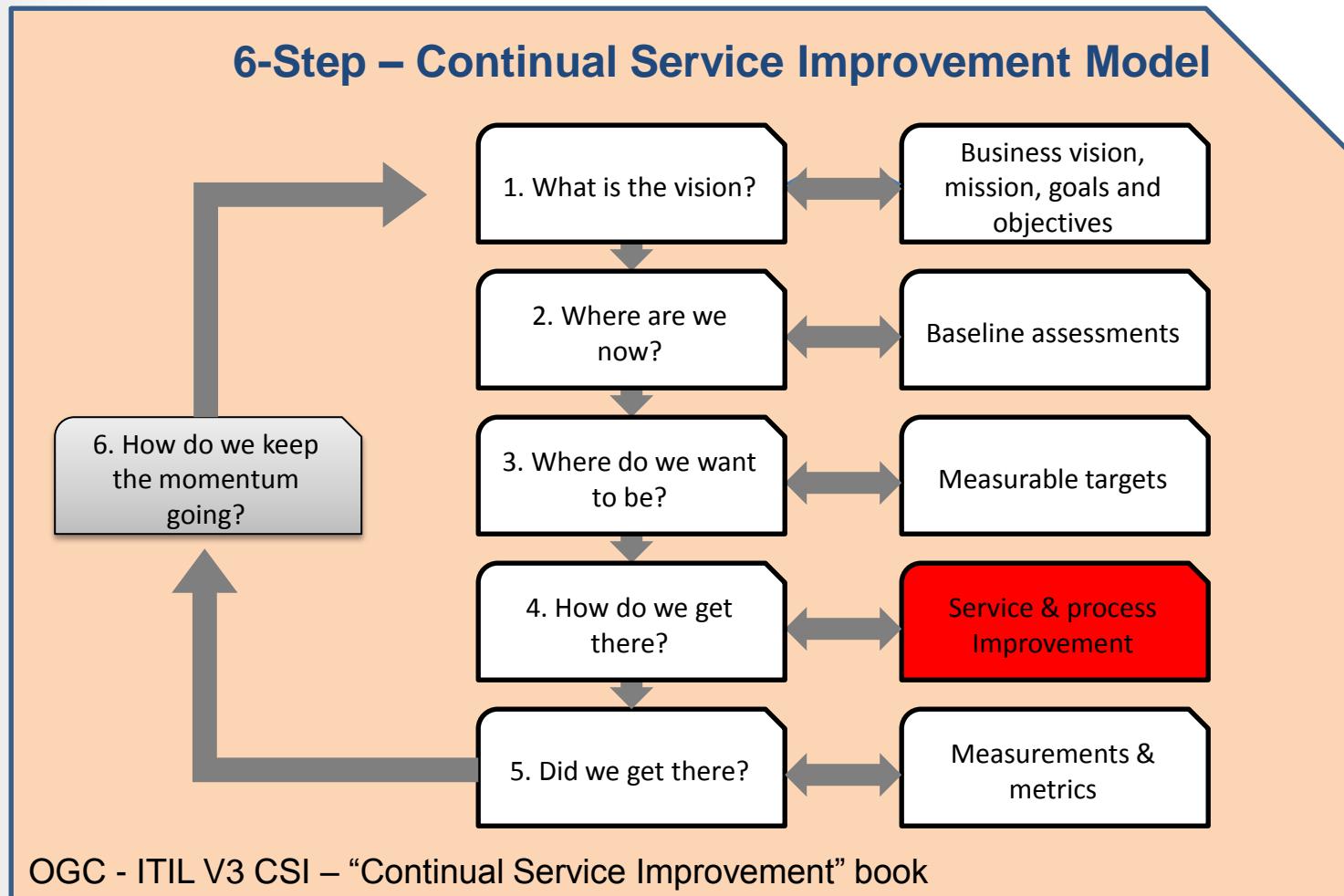
Top 3 improvements as identified by the Service Desk Team

| 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.                                 |

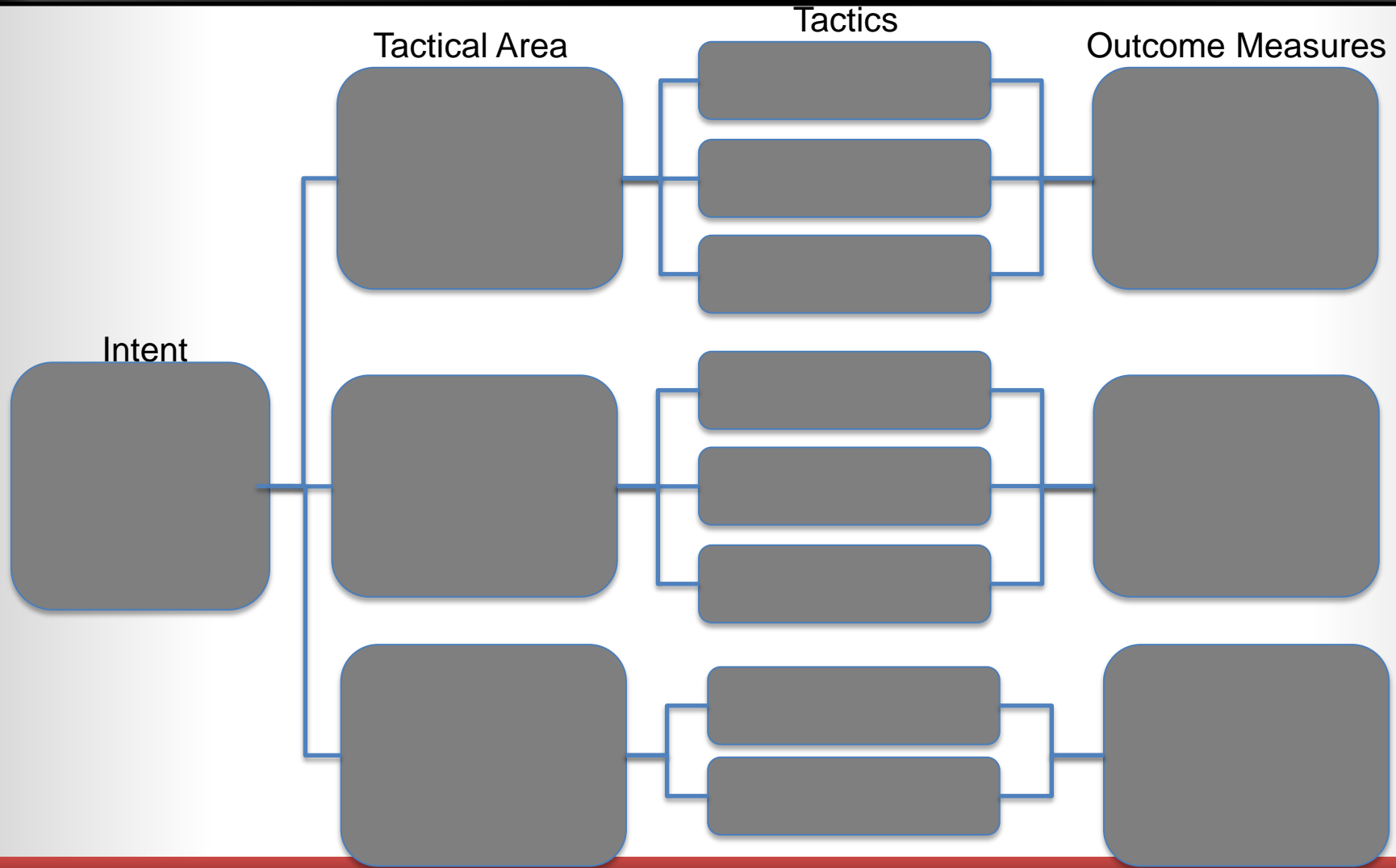
Top 3 improvement as identified by Escalation Groups

| 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.                   |

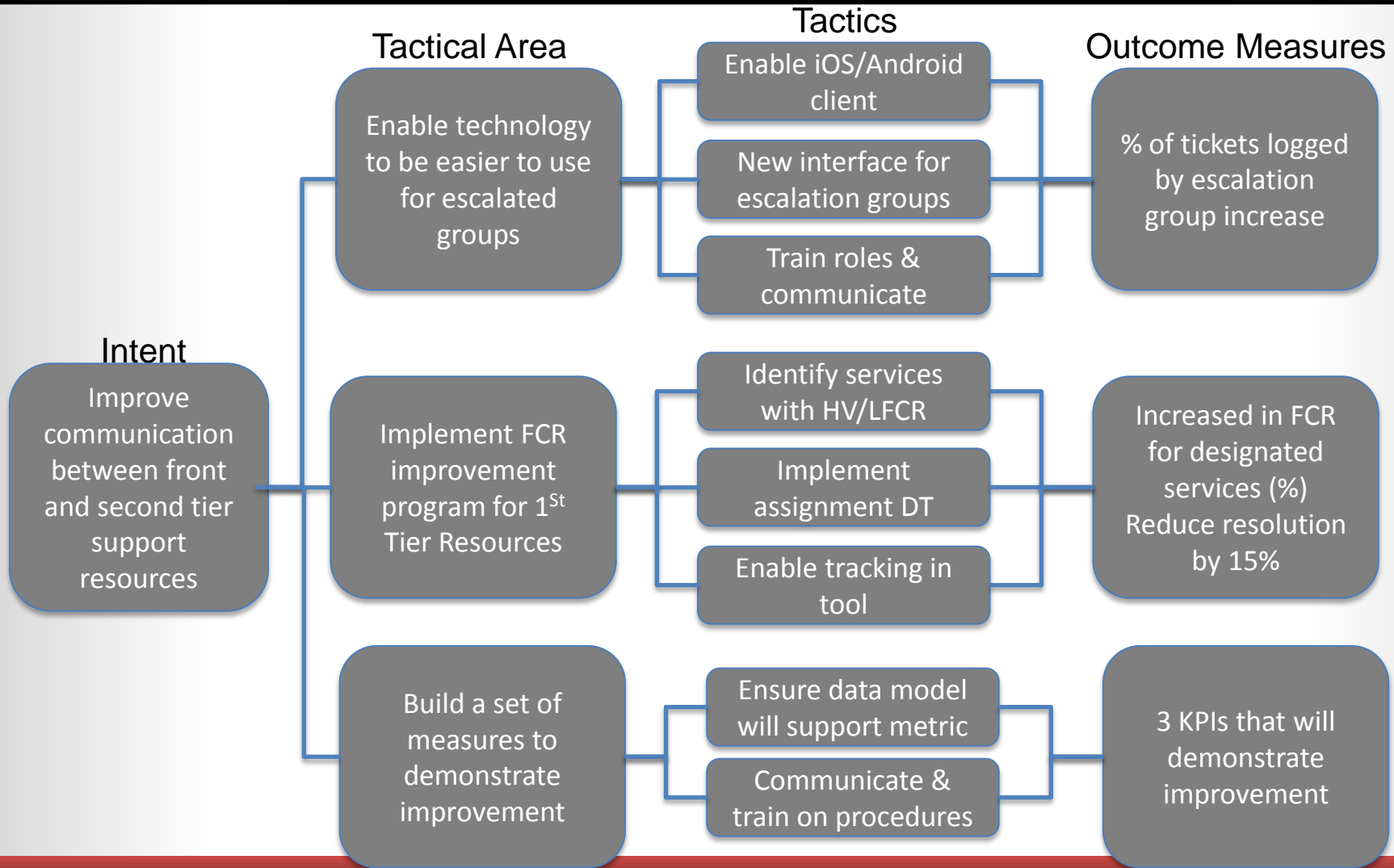
# Getting from Here to There - The Theory



# 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...

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Access example survey questions by visiting

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



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# 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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