



# Service Desk

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# End User Services – Service Desk: **Agenda**

- **SERVICE DELIVERY TRIPOD**
- **IT DELIVERY STRUCTURE**
- **SD STRATEGY**
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- **ENVIRONMENT**
- **MEASUREMENTS**
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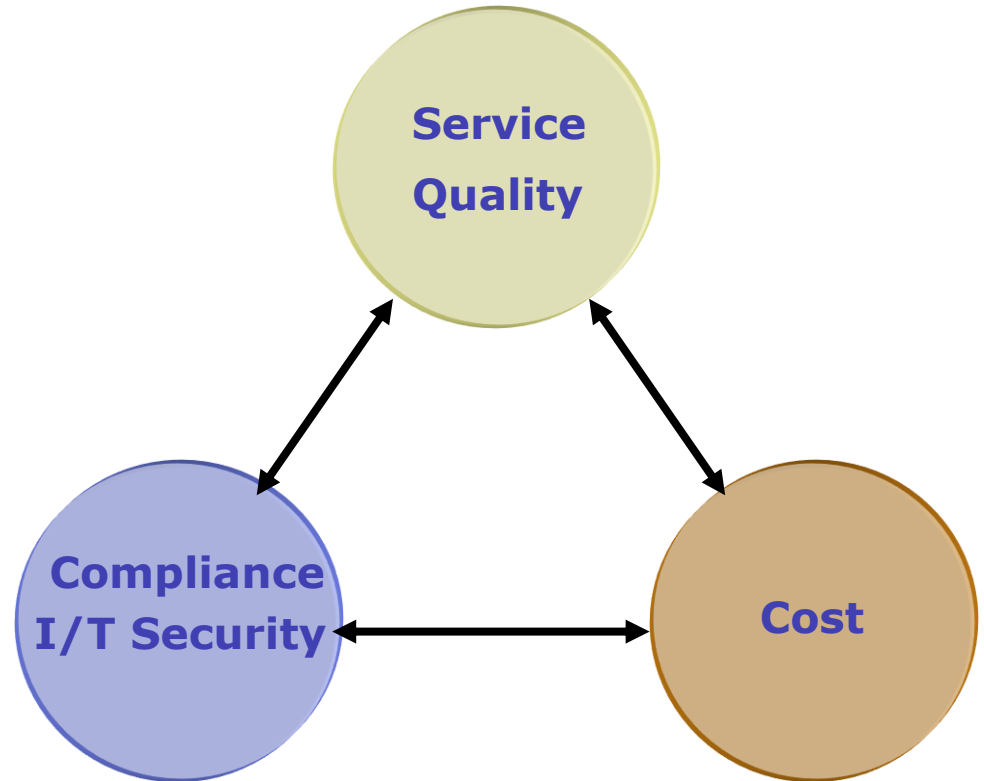


# SERVICE DELIVERY TRIPOD

## About Customer Loss

Reasons for customers leaving a company's products or services

- 1% of customers go out of business
- 3% move to another location
- 4% like to change suppliers
- 5% change on a friend's advice
- 9% buy it cheaper somewhere else
- 10% are chronic complainers
- 68% leave because the company representatives they deal with are indifferent to their needs



# IT DELIVERY STRUCTURE

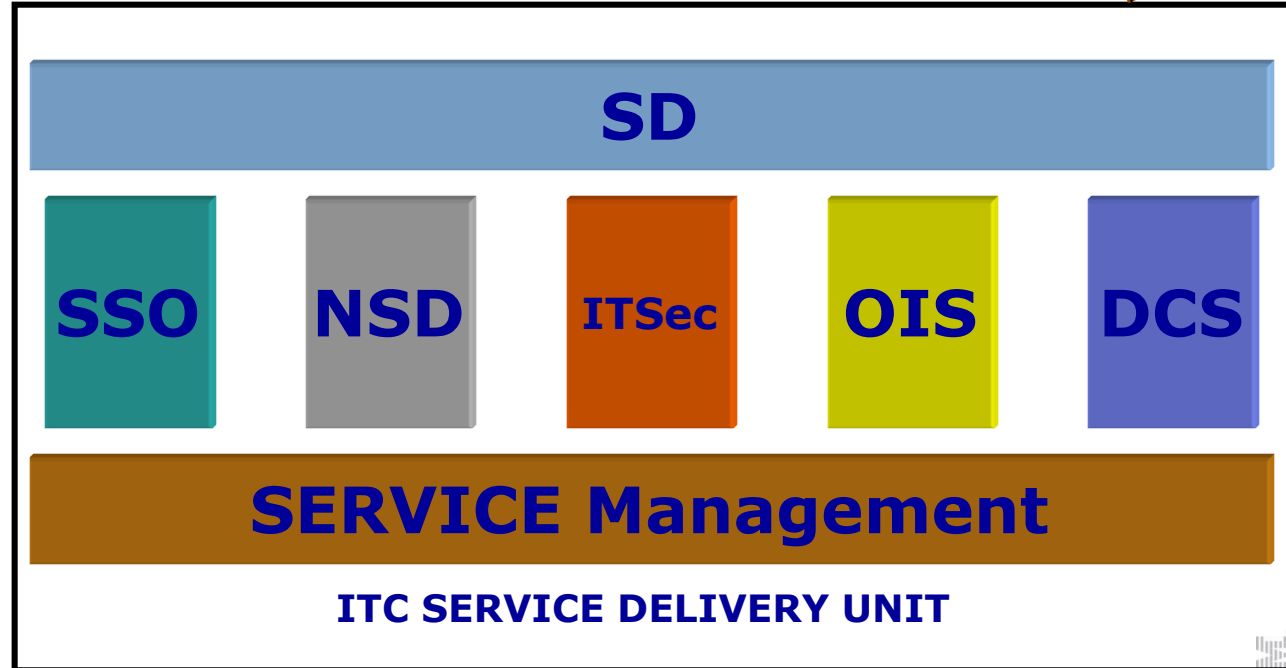
**CUSTOMER**



## IT Outsourcing Model:

Outsourcing of IT Services means to provide complex IT services for customer

**SD** ::: is customer oriented unit strongly supported by other competencies knowledge. Main role is to be interface with customer needs and play key role in information flow inside **SSO, NSD, DCS, OIS, ITSec** who are strongly technical oriented competencies. Their main role is to provide professional service to customer – IT Specialist, Solution Architects, ...



# SD STRATEGY

Model for managing SD operations is highlighted in the chart on this page. The model centres on having skilled Customer Service Representatives that will answer the vast majority of calls over the phone (or via Web/e-mail) with the customer.

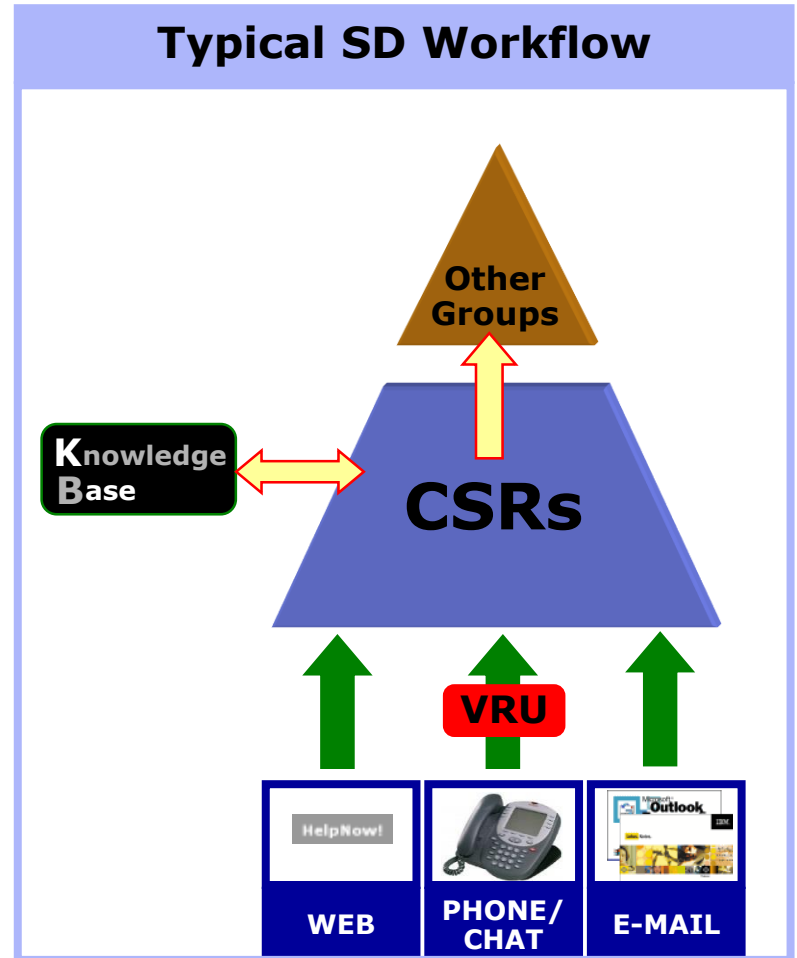
In a very small percentage of cases, the CSR will need to pass the call to another group for resolution. However, the Model is focused on keeping and resolving a maximum number of calls through the SD.

The Customer Service Representative will receive calls from 3 primary sources [Phone/Chat, Web or E-Mail] as illustrated below. On most accounts, the CSR will use a web-based or Lotus Notes knowledge base to query the customer's problem and find an appropriate solution. These knowledge bases may vary slightly from account (client) to account but the principle remains the same.

Through the use of the knowledge base system, the CSR will be in a position to resolve most customer queries.

As the CSR is speaking to the customer, he/she will also be documenting the details of the call in a ticketing system.

Each ticket will contain some basic customer details and machine information, problem description and steps taken to resolve the query. Once again, there may be slight variations from account to account.



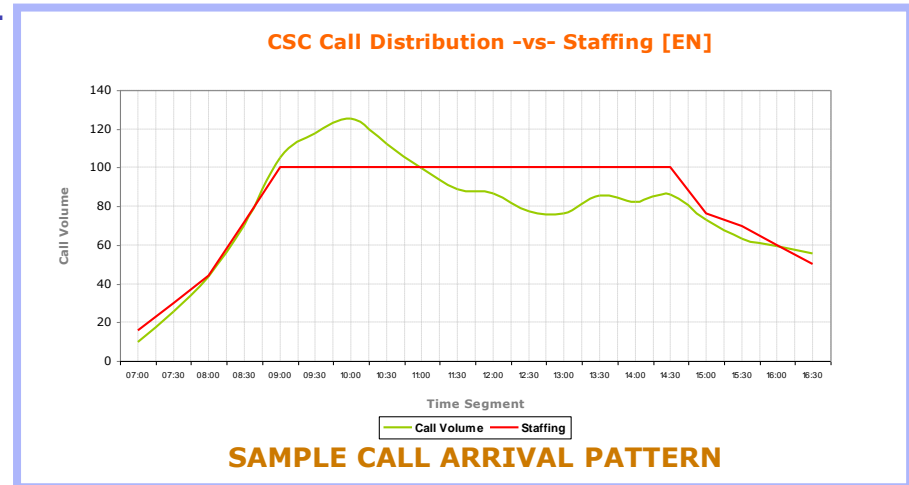
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# SD WORKLOAD

The SD typically receives work through a number of different sources : Phone, Web and E-Mail. From account to account there can be some additional sources, however these tend to be the main ones.

**PHONE CALLS/CHATS** ::: Phone calls and chats constitute the vast majority of the workload of a service desk. In order to manage these effectively, SDs develop workload arrival patterns through the use of historical data. This shows the times when customers are most likely to call or chat – see the chart below for a sample of how calls can arrive throughout the day on a specific account. This data is then used to build the staffing schedules. This is to ensure that the SD has the optimum number of staff available at the appropriate times to answer the call. In order to ensure that accurate planning can be completed, there will always be an optimum call length that CSRs will need to achieve. This is fundamental to the principles of SD Operations.

As eventuality cannot be forecast [e.g. Virus, network down], the SD calls for flexibility in it's staff in order to respond to changing call patterns. Therefore, on a given day, slight adjustments may need to be made to schedule to respond to incoming customer queries.



# SD WORKLOAD

**WEB :::** Service providers encourage the use of the web as a means of raising a query with the SD. The web interface is often coupled with some self help options as these are designed to encourage users to search for responses themselves before calling the SD.

The advantage of the web is that the SD Operation can respond to these queries when there is a period of low phone call or chat volume. This means there are less scheduling challenges. The disadvantage is that the CSR does not have the opportunity to ask the customer detailed problem determination questions (as he/she would over the phone) that may be required to resolve the issue. As a result, there may be insufficient information available to the CSR to answer the query. The net result of this is that the CSR may often be forced to get in contact with the customer to clarify details before the problem can be resolved.

**E-MAIL :::** E-mails are broadly similar to web-based queries in terms of submission by the customer and pickup by the CSR. The disadvantage is that while the web-based solution can force the customer supply some critical information, the e-mail solution rarely does so. Furthermore, it is very difficult to measure the effectiveness of the SD Operation in managing e-mail requests. Therefore, Service providers will try to encourage customers to use a combination of Web and Phone for raising queries with the SD.





# ENVIRONMENT

While the **CSRs** are usually grouped into Teams which are approximately 15 in size, the individual will perform most of his/her tasks alone. The call will be received, the CSR will work with the customer 1:1 and query the knowledge base as appropriate to retrieve the answers to customer queries. Should the query require the intervention of another group, the ticket is usually transferred electronically by the CSR.

As previously mentioned, the SD Operation is planned in great detail. Therefore, there is a requirement for each individual CSR to adhere very strictly to the pre-defined schedule. Therefore, punctuality is of utmost important for all team members.

With the SD being a stats-driven environment, each CSR will be measured against several targets. These include punctuality, call duration/hold time usage, call quality, ticket quality, Customer Satisfaction. Given the nature of the business, data is available on a very regular basis to track performance versus targets.

Each team will have a **Team Leader** who is responsible for the day-to-day performance of the Team. Each **SD Manager** will have 2 – 3 teams reporting to him/her. While he/she has ultimate responsibility for the performance of the team, he/she is less likely to be involved on the day-to-day management of the line. The SD Manager owns the relationship with the Customer and the Account Manager.

From account to account there may be some additional roles within the team – e.g. a more senior technical person.



# MEASUREMENTS

**The SD is a very heavily stats driven environment. Given the nature of the business, performance data is being produced minute by minute throughout the day. The key measurements are agreed with the customer in the contract. Please see below a list of some of the most common measurements.**

**AVERAGE SPEED OF ANSWER :::** This measures how quickly the SD Agent answers the phone. It is usually measure in seconds [10, 30, 60 etc].

**SPEED TO ANSWER :::** This Service Level is usually closely linked to the ASA as this measures the percentage of all calls that are answered within the defined ASA. If the Service Level is listed as 90%, this means that 90% of all call need to be answered within the ASA target [10, 30, 60 etc.]

**ABANDONMENT RATE :::** The Abandonment Rate measures the percentage of calls, where the customer hangs up before he/she reaches a Customer Service representative. Customers handing up is usually indicative of long wait times. Typical Abandonment rates are 2%, 5%, 10%. It is very rare to see Abandonment Rate targets that are higher than this.

**FIX RATE :::** There are several Fix Rate calculation mechanisms. However, all of these measures are designed to calculate the percentage of calls resolved by the Customer Service Representatives. Goal is to resolve as many calls as possible through the Customer Service Representatives as this is the most efficient means of handling customer queries. Most common are **FCR** - First Call Resolution and **FTF** - First Time Fix. FCR is measured as % of solved tickets with pre-defined ticket categorization (called eligible tickets), while FTF is based on all created tickets. FCR is usually used for SLA measurements.

**CUSTOMER SATISFACTION :::** On most accounts, the customers will be polled to measure their satisfaction with the service provided. This can be done in an automated fashion through a tool or alternatively through a phone call to the customer.

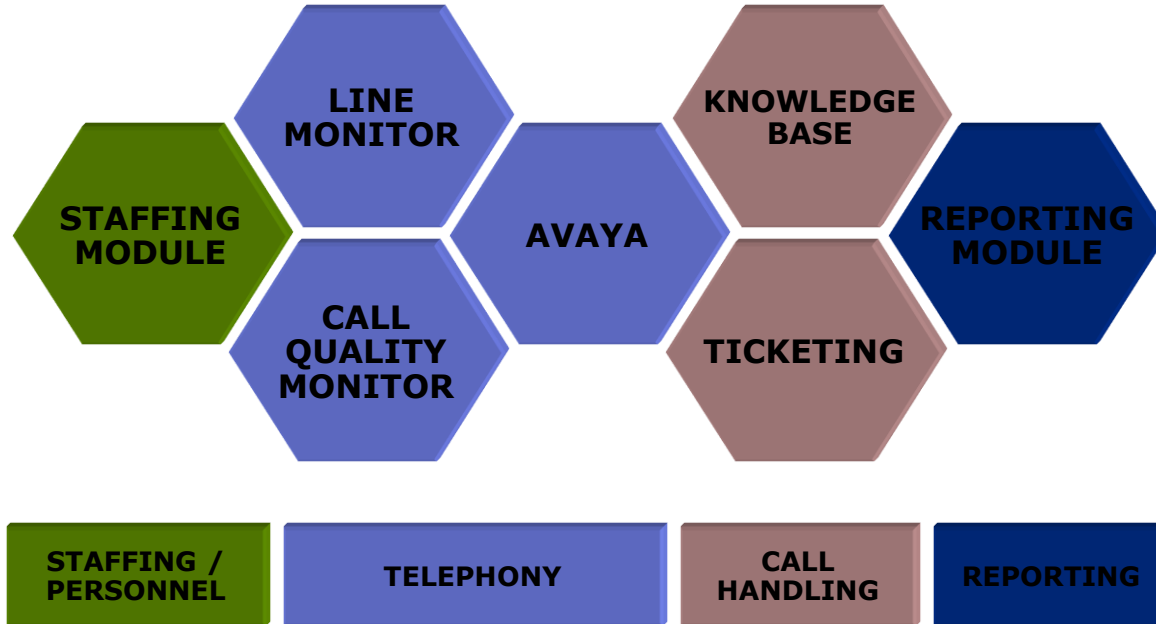


# GLOSSARY

- SLA ::: Service Level Agreement** Contracted service level usually bound with penalties (STA,CSAT...)
- ASA ::: Average Speed of Answer** This is the average time it takes to pick up a customer telephone call
- STA ::: Speed to Answer** This is the percentage of calls taken within contracted time
- CSAT ::: Customer Satisfaction** This is a measure of how satisfied customers are with the service they have received from the SD.
- SD ::: Service Desk** This is the formal title given to Helpdesks
- CSR ::: Customer Service representative** This is the official title of the 'agents' who work within the SD
- VRU ::: Voice Response Unit** This is telephony function that requests a customer to press different buttons on their telephone keypad for different services [E.G. – Press 1 for Lotus Notes]
- SSO ::: System Server Operation** This is the formal title given to Server operations [1<sup>st</sup> level – command centre, 2<sup>nd</sup> level and 3<sup>rd</sup> level]
- NSD ::: Network Service Distribution** This is the formal title given to Networking operations [1st level – monitoring, 2nd level and 3rd level]
- ITSec ::: IT Security** This is the formal title given to IT Security services
- OIS ::: Operation Infrastructure Services** This is the formal title given to Asset, order management units
- DCS ::: Distributed Computing Services** This is the formal title given to SW distribution services



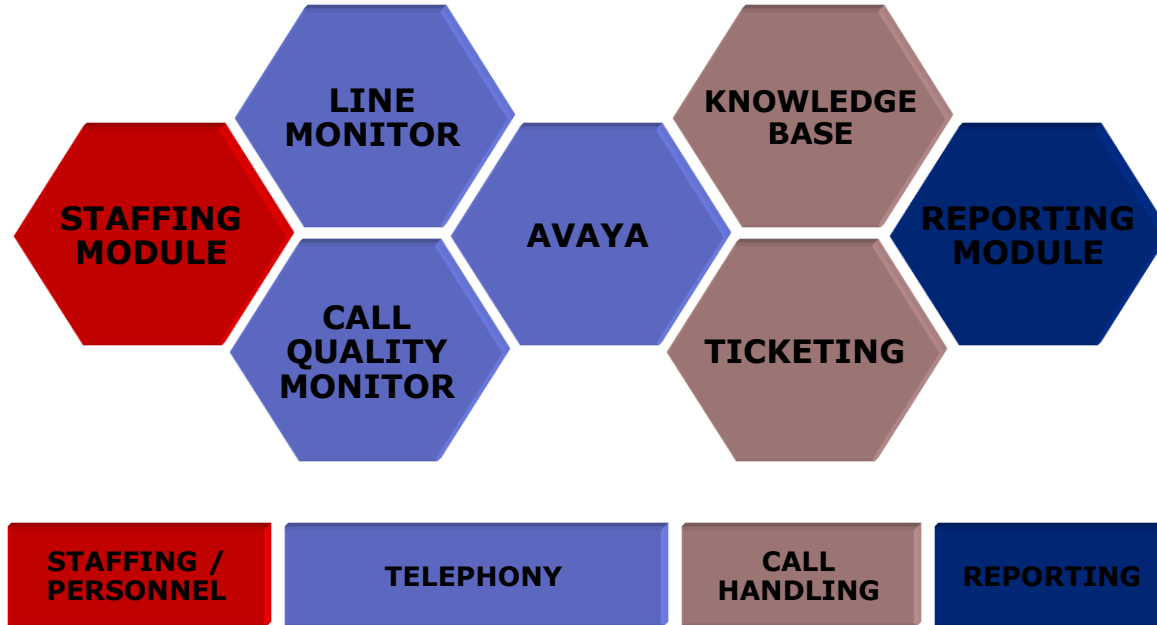
# TOOLS SUITE



A SD operation will employ a complex system of tools in order to effectively manage the service it provides. These tools will usually be divided into the following categories : Staffing & Personnel Management, Telephony, Call Handling and Reporting.



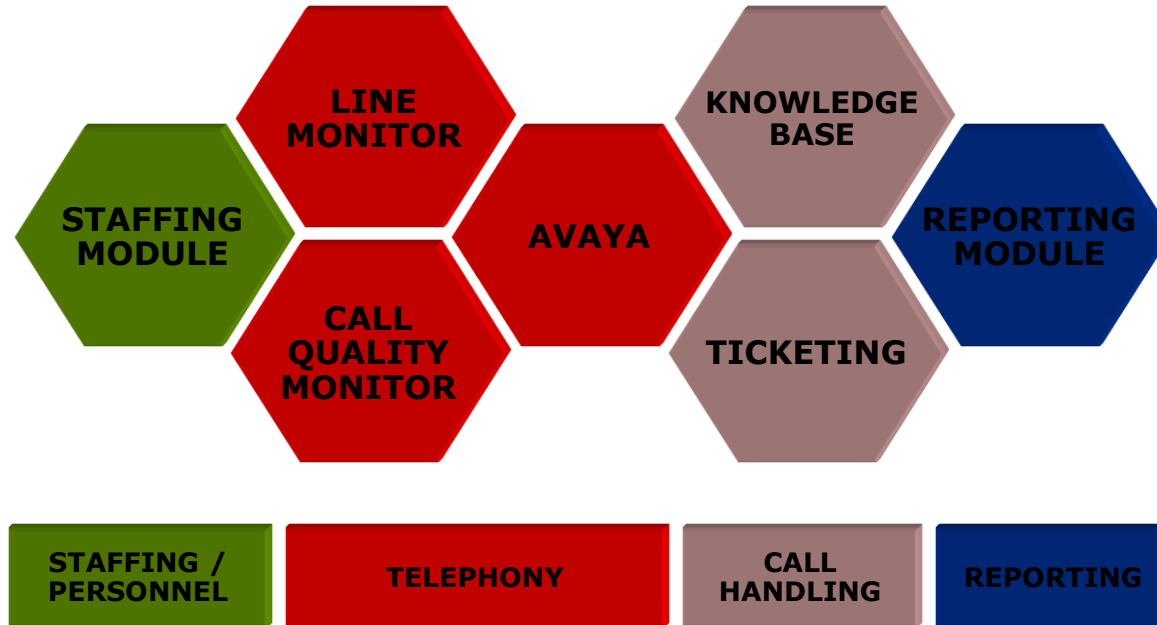
# TOOLS SUITE



**STAFFING MODULE** ::: As previously mentioned in this package, it is critical for the success of a SD Operation to have the correct number of people staffed on the line through the day. This staffing is based on historical data which can be used to predict the number of calls expected. This, in turn, is used to calculate the associated number of people required to handle these calls. The Staffing Module can be a complex tool which is integrated into the phone system and extracts data on a real time basis while some SD operations use more simplistic Spreadsheet based tools. Regardless of the solution, the Staffing Module will be responsible for items such as scheduling, vacation management, break management and training scheduling.



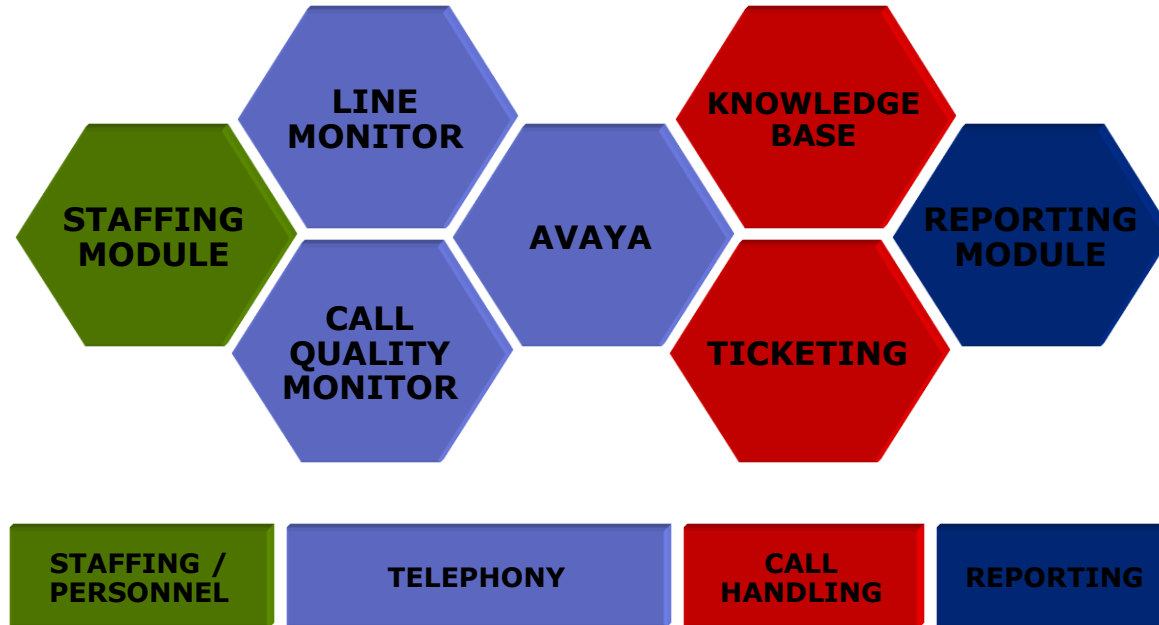
# TOOLS SUITE



**TELEPHONY MODULE** ::: The telephony module is the core of the SD Operation. Without this, there is no Service Desk. These systems gives the call centres their shape. All SDs will use a tool in order to monitor real time call activity (how many calls in the queue, actual performance against targets etc). These systems also allow the management to monitor CSR activity (how many people are on calls, how many people are available to take calls etc). Such tools are very powerful but need to be leveraged to ensure that all targets are achieved. As a SD is a customer-focused service, the quality of each and every call is of utmost importance to the Management. Therefore, it is commonplace to deploy a system which can record a sample of the calls received by the centre. These are then evaluated against a set of standards and the individual CSR may receive coaching, as required.



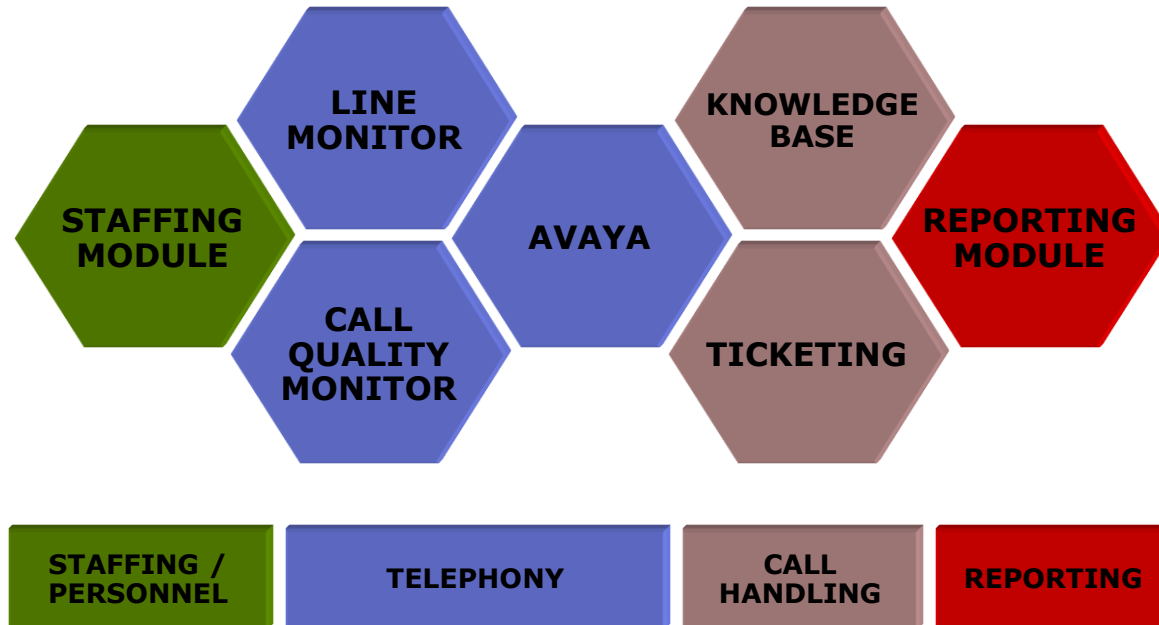
# TOOLS SUITE



**CALL HANDLING MODULE :::** Once a CSR has received a call, he/she is required to document all customer interactions in a ticketing system. It is important to carefully gather basic information about the customer's issue as these are essential for swift problem resolution. Furthermore, should the CSR be unable to resolve the query, the information will be passed electronically (through the ticketing system) to another group. These details will be by required by this group also so they need to be clearly documented in the ticket. In order to help the CSR with the resolution of the problem, he/she will use a knowledge base of information. By asking the customer clear problem determination questions and using this information to query the database, the CSR will be able to find detailed, step-by-step instructions to resolve the customer's problem.



# TOOLS SUITE



**REPORTING MODULE** ::: A SD operation is measured against a number of key targets (STA, Abandonment Rate, First Call Resolution and Customer Satisfaction). While the exact nature of the targets may vary from account to account, the requirement to produce performance reports at regular intervals does not. SD Operations often deploy automated tools to produce the required customer reports. This can include a automated survey tool which sends an electronic survey to customers and tabulates the responses or web based solutions that report on the performance of the account versus telephony metrics (ASA, Service Level and Abandonment Rate). Given the volume of work handled by SD Operations, it is important to automate as much of the reporting as possible as manual report generation is both time consuming and prone to error.





Questions?