

Service Desk

Client Innovation Centre Brno, Czech Republic

March 2019, Miroslav Jindra



about the lecturer



Miroslav Jindra

Service Desk Business Operations Manager

Education

Lycee of Matyas Lerch, Masaryk University - ESF

IBM career

2009 – IMAC coordinator and Centralized Technical support

2010 – Team Leader, Project Coordinator

2012 – Account Delivery Leader

2013 – Service Delivery Manager

2014 – 1st line & Service Delivery Manager

2018 – Business Operations Manager

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2

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Why IBM – first just the job, then realized I can do a job + what I like (learn, teach, give back...)

agenda

Service Delivery & Structure

- Delivery Tripod
- IT Structure overview

Service Desk

- Strategy
- Workload
- Roles and Responsibilities
- Measurements
- Glossary

Tools

- Staffing
- Telephony
- Event processing
- Reporting

Importance of Service Desk in business

- Start job for talents
 - Helping people to find a path in IT
 - Brewery for leadership and other paths
 - Communication skills as basic tool of future success
 - Improvement of language skills
 - Real experience
 - Full capacity understanding
- Face of business
 - Showplace for services
 - Key component of E2E service
 - E2E overlap
 - Ideas for business improvement
 - Center of success promotion
 - Project support

Purpose

Why

First line of contact for end users which directly resolves customer queries or co-ordinates with other resolver teams on behalf of the client.

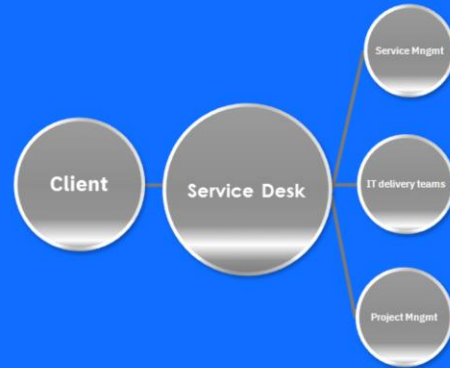
SD unit is also a supporting source of information for Service and Project management decision making.

How

- SLA's set to measure main success criteria:
- First Call Resolution %
- Speed To Answer %
- Customer Satisfaction %

What

Fastest possible resolution to as many as possible client's IT requests and incidents with high Customer Satisfaction.



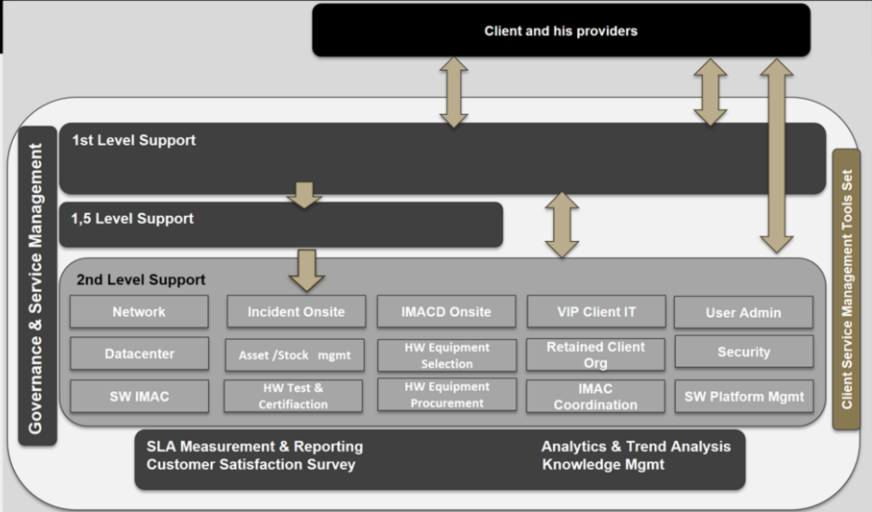
SERVICE DELIVERY TRIPOD

Common customer loss reasons

- 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



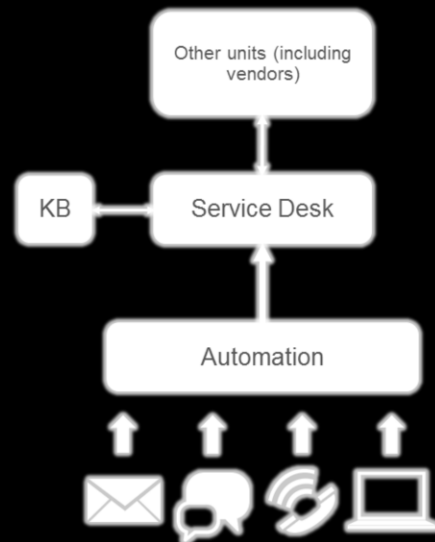
Service Desk Strategy

Simplified SD operations are highlighted in the chart on right. The model is focused on automatized processing of as many incoming requests as possible. If not possible, skilled CSR - Customer Service Representatives (Service Desk) will answer the incoming query either via chat/phone/e-mail or self-service (web) request. Requests that require involvement of other groups for resolution, will be transferred in form of ticket further. The primary goal is to minimize need for involvement of other groups and have queries resolved through automation (0 level) or at 1st level (Service Desk).

Knowledge base is mostly personalized to each customer and can be either web-based or database based for example in Lotus notes. It's purpose is to help to resolve customer's query or provide appropriate process to achieve resolution (which specific data are necessary to gather and where to look for further support).

As the CSR is speaking to the customer, he/she will also document the details of the call in a ticketing system. Each ticket will contain some basic customer details, machine information, problem/request classification and description, including steps taken to resolve the query. There may be slight variations from client to client, but the base remains the same.

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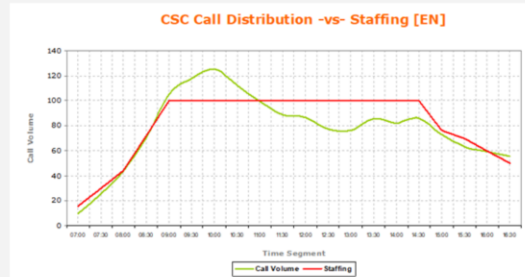
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Service Desk Workload

Phone/Chat

Phone calls and chat make usually the majority of incoming workload. To manage them 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 on right as an example of single day data. This data is used to build the necessary staffing schedules to ensure optimum number of staff available throughout the day. While there is usually as well an optimum call length, CSR can't dictate the length of each call, but based on request classification can decide which cases are to be considered out of it's scope to achieve necessary availability (Example: re-installation with multiple steps and average length above 20 minutes will not be carried out by the SD and will be transferred to another group. This is fundamental to the principles of SD Operations.

As eventuality cannot be forecast (e.g. Network outage), there's need for flexibility in staff in order to immediately respond to changing call patterns (at any time slight adjustments may need to be made as reaction to significant change in incoming customer queries.



Service Desk Workload

Web (Self-service)

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 reaching 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. Modern trend is to automatically transform E-mails into Self-service tickets through automation processes, that are based on contents of e-mail (key-words, attachments, etc.) or remove email completely and use only webtickets.

Roles and Responsibilities

Customer Service Representative (SD agent)

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.

SD Operation is planned in great detail, punctuality is therefore of utmost importance for all members.

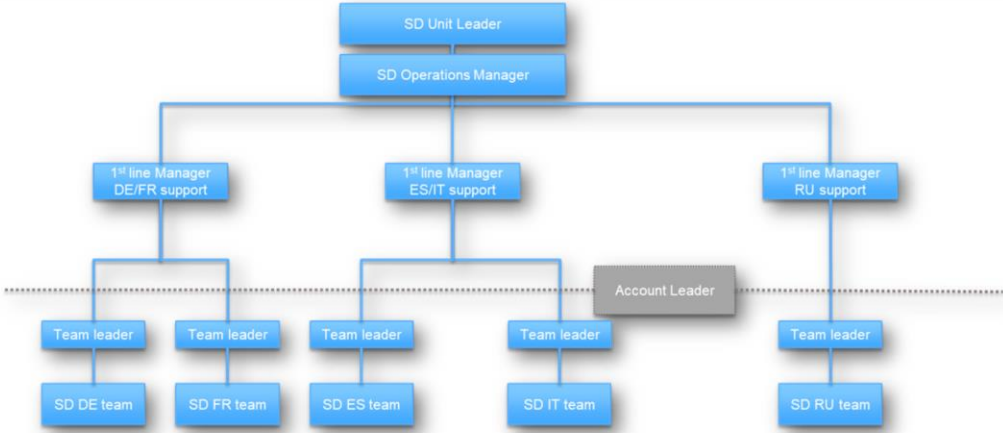
SD is a fast paced, measurement driven environment. Each CSR will be measured against multiple targets. These include punctuality, First-Call resolution, call duration/hold time usage, call quality, ticket quality, Customer Satisfaction, quantitative data as well. Given the nature of the business, data is available on a very regular basis to track performance versus targets.

Team Leader/Account Leader/Service Desk Manager

Each team will have a **Team Leader** who is responsible for the day-to-day performance of the Team. As teams can be grouped based on language or product support, they can be providing support for multiple clients/accounts. Clients are often supported through multiple teams, therefore while Team-leader is responsible for day-to-day team performance, under such circumstances there's a need for Account Leaders as well. **Account Leaders** are responsible for day-to-day performance cross teams for their clients and ensure the differences in teams performance is balanced to deliver service within contractual targets.

Each SD Manager will have 2 – 3 teams reporting to him/her, while having ownership of performance for some of the clients/accounts as well. While SD manager 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 and rather focus on long-term planning and continuity of the service. The SD Manager owns the relationship with the Customer and the Account leadership.

Roles and Responsibilities – organization chart



SD Measurements

Given the nature of the SD business, performance data is being produced minute by minute throughout the day. The key measurements are agreed with the customer in the contract.

Time metrics

AR (Abandon Rate) Example: AR \leq 6%
Percentage of dropped calls over total offered (incoming) calls.

ASA (Average Speed to Answer) Example: ASA \leq 20 sec
The average time (usually expressed in seconds) it takes for a Service Desk to answer an incoming call.

STA (Speed To Answer) Example: STA \Rightarrow 80% in 20 sec.
The percentage of incoming calls answered within a given time frame (usually expressed in seconds).

Email/Web Response Time Example: Email Resp. \Rightarrow 80% in 2 hrs or Avg Email Resp. \leq 2 hrs
Time taken to react to customer email request (can be response or ticket creation). The calculation may be based on the same principles applied to ASA or STA.

Quality metrics

FTF (First Time Fix), SDE (Service Desk Effectiveness) or FCR (First Call Resolution)

FCR Example: FCR \Rightarrow 70%

Percentage of eligible requests resolved by the Service Desk with no need for technical escalation.

CSAT (Customer Satisfaction) Example: CSAT $>$ 80%

The customers will be polled to measure their satisfaction with the service provided. This is mostly done in an automated fashion through a tool or alternatively can be done through a phone call to the customer.

Targets must be: attainable, repeatable, measurable, understandable, meaningful, controllable, affordable, mutually acceptable

Glossary

SLA ::: Service Level Agreement - Contracted service level usually bound with penalties (STA,CSAT...)

SLO ::: Service Level Objective - Commitment to maintain a particular state of the service in a given period

KPI ::: Key Performance Indicator - KPI measurement may be functional to the achievement of strategic goals, quality standards, or performance assessment against any given factor

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.

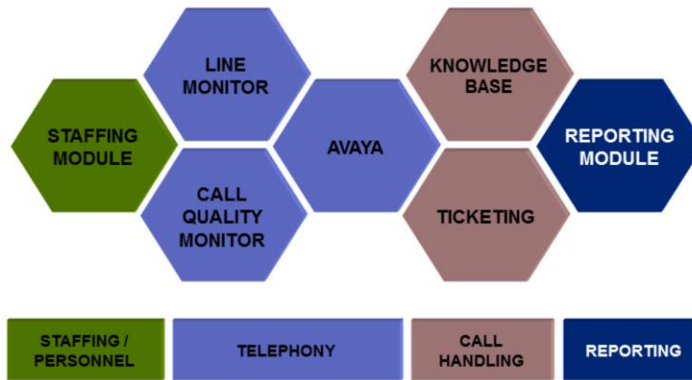
SD ::: Service Desk - This is the formal title given to Helpdesks

CSR ::: Customer Service representative - This is the official title of the 'agents' who work within the SD

KB ::: Knowledge Base – storage of specific client knowledge documentation

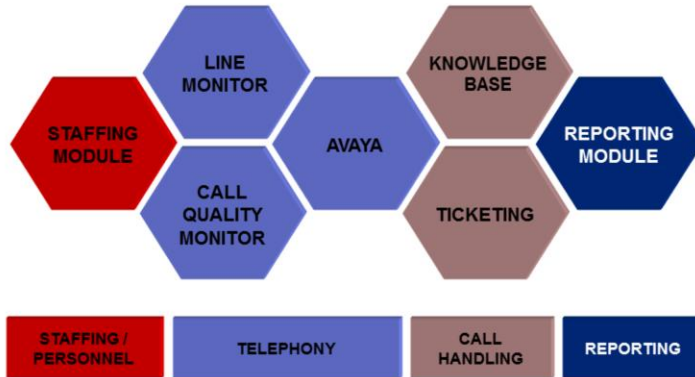
SPOC ::: Single point of contact – standard term for services were SD is the only function communicating with client

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

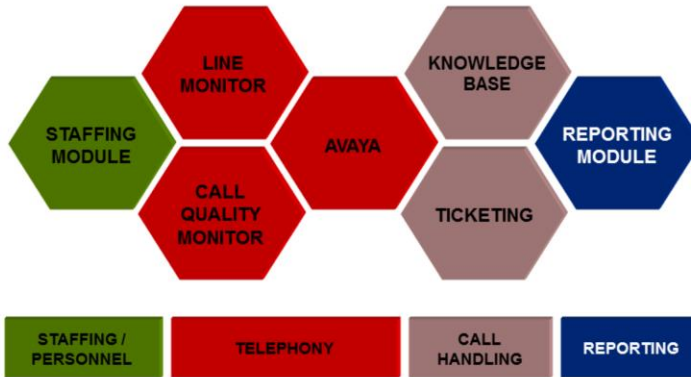


STAFFING MODULE ::: As previously mentioned in this package, it is critical for the success of a SD Operation to have the correct number of people staffed on the line through the day. This staffing is based on historical data which can be used to predict the number of calls expected. This, in turn, is 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.

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TELEPHONY MODULE ::: The telephony module is the core of the SD Operation. Without this, there is no Service Desk. These systems give 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.

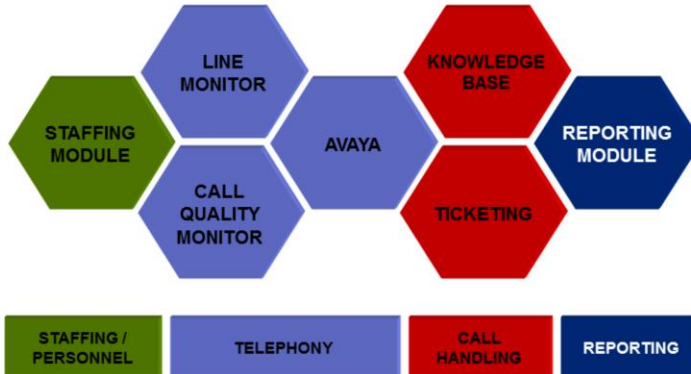
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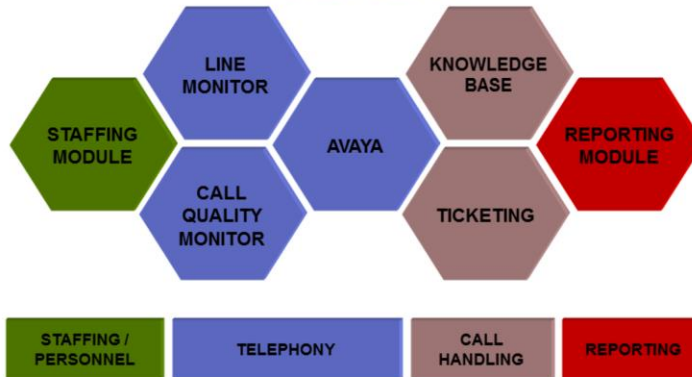


CALL HANDLING MODULE ::: Once a CSR has received a call, he/she is required to document all customer interactions in a ticketing system. It is important to carefully gather basic information about the customer's issue as these are essential for swift problem resolution. Furthermore, should the CSR be 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.

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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.

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AI-powered service desk... Why do we need it?

Problem

Organizations worldwide are challenged to provide service desk support at all hours of the day for geographically-dispersed and mobile teams

Solution

IBM Workplace Support Services with Watson addresses the challenge in a way that reinvents the traditional service desk with personal virtual assistants which...

- Provide users with self-help capabilities using natural language
- Remember user preferences
- Are always available
- Are cognitive, they learn from every interaction, increasing the user satisfaction

Link: <https://www.ibm.com/us-en/marketplace/end-user-support-services>

Do we really need it?

70%

of consumers will choose messaging
over calling if given the choice



Link: <https://www.liveperson.com/taxonomy/term/329>

64%

of consumers expect real-time responses at any time



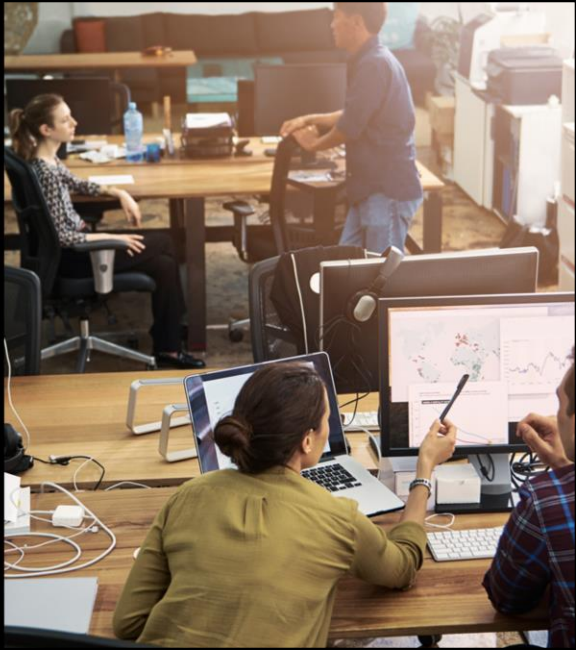
Call Center Research. Salesforce:

<https://www.salesforce.com/blog/2017/07/customers-expectations-in-age-of-the-customer.html>

Chatbots will save businesses more than

\$8b

per year by 2022

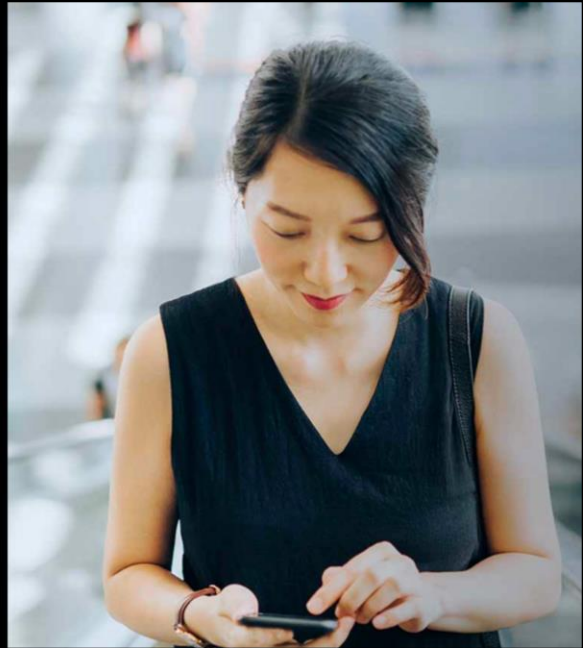


By 2020, 80 percent of outsourced service desks for global enterprises will no longer require human service desk agents for the first contact. "Predicts 2018: Infrastructure Services in a State of Disruption," Gartner, 07 December 2017.

Link for figure in the slide: <https://www.juniperresearch.com/press/press-releases/chatbots-a-game-changer-for-banking-healthcare>

#1 choice

for consumers communication with
brands is messaging



Survey of 3001 US-based consumers, aged 18-65, conducted by Survata Research (August 2016)

The typical **Millennial** exchanges an average of

67

text messages per day.

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Americans now spend around

5X

longer in messaging apps each day than on voice calls.

nielsen

WhatsApp and Facebook Messenger alone carry

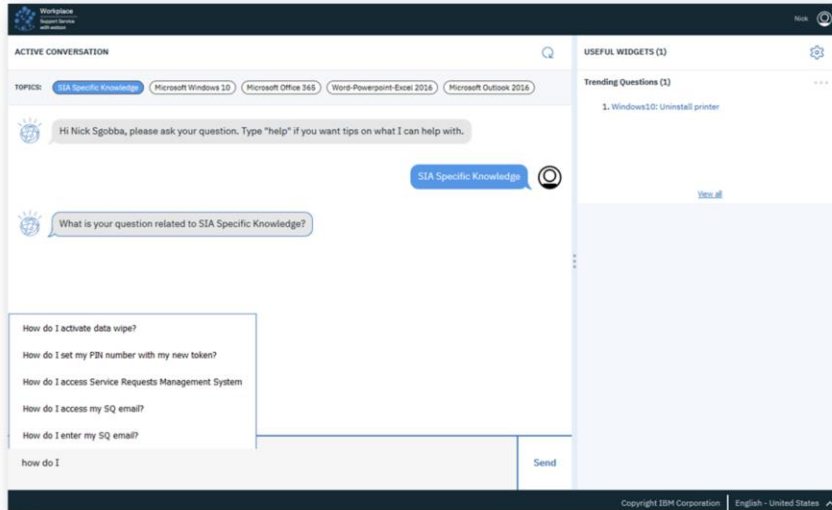
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trillion messages per year.

facebook.

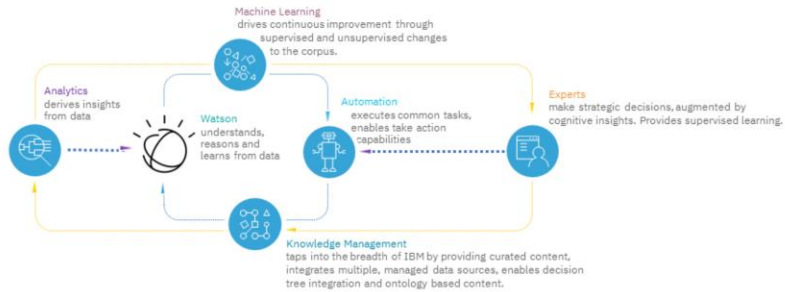
Survey of 3001 US-based consumers, aged 18-65, conducted by Survata Research, August 2016

How this looks like?



Link: <https://www.ibm.com/us-en/marketplace/end-user-support-services>

How this works... Simplified version



Analytics

- Periodic Ticket Analysis
 - Unstructured data analysis
 - Service Desk SLA Reporting
 - Semantic AND Sentiment analysis

Cognitive

- Watson Chat
- Long Tail Search
- Watson MicroServices
- Crawl & Index Bot (for KB Mgmt)
- Knowledge Engineers
- Omni Channel Capable

Automation

- Robot Process Automation Engineers (RPA)
- Workstation Fixlet Engineers

Adoption

- Information Architects
- IVR Simplification
- Agent Assist
- 30,000 How-To KBs & Videos
- Standard Agile Methodology & Practice

Link: <https://www.ibm.com/us-en/marketplace/end-user-support-services>

