

HDI CUSTOMER SATISFACTION BENCHMARKING STUDY REPORT

AUGUST 2012

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August | 2012

About HDI

HDI is the leading professional association and certification body for technical service and support professionals. Facilitating collaboration and networking, HDI hosts industry conferences and events, produces comprehensive publications and research, and connects solution providers with practitioners, all while certifying and training thousands of professionals each year.

HDI serves a community of over 120,000 members, followers, customers, solution providers, and contributors throughout the service industry, supporting sixty local chapters across North America. Guided by an international panel of industry experts and practitioners, HDI is the community's premier resource for best practices and emerging trends.

About the HDI Customer Satisfaction Index Service



Developed by forty-seven industry practitioners and customer satisfaction experts, the HDI Customer Satisfaction Index Service is a user-friendly, secure, web-based service that provides an affordable tool for gauging your customers' satisfaction. Easily conduct real-time, benchmarking, download on-demand reports, automate response alerts, and more. To learn more about this service, visit www.ThinkHDI-CSI.com to take a tour, download a brochure, register for an online demo, or request a free three-month trial.

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Introduction

The purpose of this study is to measure the level of customer satisfaction over a diverse group of technical service and support centers that use a standardized set of survey questions. This provides an objective, overarching view of the performance of the frontline IT support analysts from the customer perspective.

According to the *2011 HDI Support Center Practices & Salary Report*, 83 percent of support centers measure customer satisfaction in some fashion. Sixty-six percent of support centers use incident-based surveys, which are sent out after an incident has been resolved and the ticket closed (22% survey all closed tickets, 44% survey a random sampling of closed tickets). Additional survey methods include monthly, quarterly, and annual surveys, as well as special-purpose surveys. Only 17 percent of support centers reported that they do not measure customer satisfaction.

The high percentage of support centers that survey their customers indicates a desire to gain insight into customer perception, which suggests a growing awareness of the importance of customer service in the technical service and support industry. In addition to illustrating the technical support industry's performance in terms of customer satisfaction, this report provides a breakdown of results by industry to enable benchmarking from different perspectives. Individual support centers can compare their customer satisfaction ratings to the industry as a whole as well as to support centers in specific industries. In addition, the results are broken out by demographic area: industry, type of support, size of customer base, and customer location. This segmentation facilitates benchmarking from many different perspectives.

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About This Report

The results reported here are based on 357,573 customer satisfaction surveys completed by the customers of 510 support centers representing 215 companies (a company may have more than one support center). All of these support centers are actively using the HDI Customer Satisfaction Index Service (hereafter HDI CSI Service). This data was collected from March 30 through July 2, 2012.

The HDI CSI Service is a standardized customer satisfaction survey. Customers receive the survey automatically, via email, at the conclusion of an interaction with a support center. They are asked to answer the following questions, rating the analyst who handled their incident or request on a scale from one (“very dissatisfied”) to five (“very satisfied”):

- ▶ How satisfied are you with the courtesy of the analyst?
- ▶ How satisfied are you with the technical skills/knowledge of the analyst?
- ▶ How satisfied are you with the timeliness of the service provided?
- ▶ How satisfied are you with the quality of the service provided?
- ▶ How satisfied are you with the overall service experience?

See the appendix for a copy of the survey the customer receives.

The HDI CSI Service is used by support organizations around the world. This report analyzed surveys collected from support centers in twenty-three countries, including the United States (81%), Canada (4%), Brazil (4%), Sweden (2%), Australia (2%), and Ireland, France, and India (approximately 1% each). The other countries that use the HDI CSI Service each contributed less than one percent to the total survey count.

These organizations represent more than thirty industries, with support center staff sizes ranging from ten or less (9%) to more than 5,000 (8%). They provide support to internal and/or external customers. Internal support centers made up the majority (54%) of the surveys in this study; external support centers contributed seven percent, while those that provide both internal and external support made up 34 percent. A modest percentage of support organizations (6%) elected not to respond to this demographic question, but are nevertheless included in the overall results.

The number of customers supported by individual support centers ranges from less than twenty customers to more than 1,000,000 customers. Of the customers who use the support centers included in this study, eight percent are at a single site in a single country, 48 percent are at multiple sites in a single country, and 39 percent are in multiple countries. Again, this field was left blank by six percent of support centers.

This report is divided into five sections. The first addresses the overall study results, and includes a summary of all surveys collected for this study. These results are presented in two tables that report the frequency of responses and the means (averages) for each question on the survey.

The four remaining sections break the results down by demographic category: industry, type of support (i.e., internal, external, or blended), size of customer base, and customer location. Each section includes a table that lists the number of support centers, number of companies, and number of surveys analyzed for each demographic. The customer satisfaction scores for each segment of the industry are reported in three ways for each question:

1. Frequency of response
2. Total satisfaction (the combined percentage of all responses above neutral [i.e., a rating of four or five])
3. Mean (average) score

By providing the survey results for the industry segments in this manner, this report provides a useful benchmarking tool for individual support centers.

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Overall Results

Every year that we've performed this benchmarking study, the customer satisfaction ratings from the overall analysis have been higher than expected. Most support center customers (84%) report being very satisfied with the overall service experience. Using a five-point scale—where five is “very satisfied”—the means (averages) are in the high 4s.

The survey asks one question about the customer's satisfaction with the overall service experience and four questions about the customer's satisfaction with specific factors related to the ticket's resolution: courtesy of the analyst, technical skills/knowledge of the analyst, timeliness of the service provided, and quality of the service provided. Consistent with the 2007 and 2010 studies, while the scores in all five areas were higher than anticipated, customers are consistently most satisfied with the courtesy of the analyst and least satisfied with the timeliness of the service provided. One possible explanation is that customer expectations are higher for quick resolution than they are for friendly service.

Customers rate each question in the survey on a scale of one (“very dissatisfied”) to five (“very satisfied”); N/As are not included in the analysis. The table below displays the percent of responses to the five standard survey questions for all surveys in the study's three-month time period (number of companies = 215; number of support centers = 510; number of surveys = 357,573). As an example of how to read the data, during the collection period, 90 percent of customers were very satisfied with the courtesy of the analyst on a particular ticket. The second table reports the mean (average) scores for each question.

OVERALL SURVEY RESULTS

Customer satisfaction with...	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)
The courtesy of the analyst	1%	1%	2%	7%	90%	97%
The technical skills/knowledge of the analyst	1%	1%	3%	9%	86%	95%
The timeliness of the service provided	3%	2%	3%	9%	83%	92%
The quality of the service provided	2%	1%	2%	8%	87%	94%
The overall service experience	2%	2%	3%	9%	84%	93%

OVERALL MEAN (AVERAGE) SCORES

Customer satisfaction with...

The courtesy of the analyst	4.84
The technical skills/knowledge of the analyst	4.78
The timeliness of the service provided	4.69
The quality of the service provided	4.76
The overall service experience	4.72

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Results by Industry

Surveys were collected from support centers representing more than thirty industries. All of these industries' data are included in the overall results (previous section). In this section, the survey results are also broken down for eight industries, each of which had at least ten support centers from at least ten different companies.

INDUSTRY	Number of Support Centers	Number of Companies	Number of Surveys
Computers - Software	70	25	31,129
Education	89	43	34,716
Financial Services - Banking	36	12	26,200
Financial Services - Insurance	25	12	16,235
Government	26	13	15,701
Healthcare	92	38	95,749
Manufacturing (noncomputer)	48	15	50,641
Utilities/Energy	13	10	9,094

Satisfaction with THE COURTESY OF THE ANALYST

	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	Mean
Computers - Software	1%	1%	3%	8%	87%	95%	4.78
Education	1%	1%	2%	7%	89%	96%	4.82
Financial Services - Banking	1%	0%	1%	5%	93%	98%	4.89
Financial Services - Insurance	1%	0%	2%	5%	92%	97%	4.87
Government	1%	0%	2%	6%	91%	97%	4.87
Healthcare	1%	0%	2%	10%	87%	97%	4.87
Manufacturing (noncomputer)	0%	0%	2%	6%	91%	97%	4.83
Utilities/Energy	0%	0%	1%	6%	91%	98%	4.87

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Satisfaction with THE TECHNICAL SKILLS/KNOWLEDGE OF THE ANALYST

	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	Mean
Computers - Software	2%	2%	4%	11%	82%	92%	4.68
Education	2%	1%	3%	9%	85%	94%	4.74
Financial Services - Banking	1%	1%	2%	6%	91%	97%	4.86
Financial Services - Insurance	1%	1%	3%	8%	87%	95%	4.79
Government	1%	1%	2%	7%	89%	96%	4.82
Healthcare	1%	1%	2%	7%	89%	96%	4.82
Manufacturing (noncomputer)	1%	1%	2%	12%	84%	96%	4.78
Utilities/Energy	1%	1%	2%	9%	87%	96%	4.80

Satisfaction with THE TIMELINESS OF THE SERVICE PROVIDED

	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	Mean
Computers - Software	5%	3%	5%	11%	77%	88%	4.53
Education	3%	2%	4%	9%	83%	92%	4.68
Financial Services - Banking	2%	1%	2%	7%	88%	95%	4.78
Financial Services - Insurance	3%	2%	4%	8%	83%	91%	4.65
Government	2%	1%	3%	7%	86%	94%	4.75
Healthcare	2%	1%	3%	7%	86%	94%	4.74
Manufacturing (noncomputer)	2%	2%	3%	12%	82%	93%	4.70
Utilities/Energy	2%	2%	3%	9%	85%	93%	4.72

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Satisfaction with THE QUALITY OF THE SERVICE PROVIDED

	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	Mean
Computers - Software	3%	2%	3%	10%	81%	91%	4.63
Education	2%	2%	3%	8%	85%	93%	4.72
Financial Services - Banking	1%	1%	2%	6%	91%	96%	4.84
Financial Services - Insurance	2%	1%	2%	7%	88%	95%	4.78
Government	2%	1%	2%	6%	89%	95%	4.80
Healthcare	2%	1%	2%	6%	89%	95%	4.80
Manufacturing (noncomputer)	1%	1%	2%	11%	84%	95%	4.76
Utilities/Energy	2%	1%	2%	8%	87%	95%	4.77

Satisfaction with THE OVERALL SERVICE EXPERIENCE

	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	Mean
Computers - Software	4%	3%	4%	11%	78%	89%	4.58
Education	3%	2%	3%	9%	83%	92%	4.69
Financial Services - Banking	1%	1%	2%	6%	89%	95%	4.81
Financial Services - Insurance	2%	2%	3%	8%	85%	93%	4.72
Government	2%	1%	2%	7%	87%	94%	4.77
Healthcare	2%	1%	3%	7%	87%	94%	4.77
Manufacturing (noncomputer)	2%	1%	3%	12%	82%	94%	4.72
Utilities/Energy	2%	2%	3%	9%	85%	94%	4.73

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Results by Type of Support

Support centers using the HDI CSI Service provide support to internal customers only, external customers only, or a blend of both. This section reports the results for each type of support. Across all five questions, external support center customers tend to rate their experiences lowest. This does not necessarily indicate a lower quality of service, but possibly a higher expectation for service when customers are paying for a product or service.

TYPE OF SUPPORT	Number of Support Centers	Number of Companies	Number of Surveys
Blended	172	99	119,783
External	74	30	23,773
Internal	207	102	192,331

Satisfaction with THE COURTESY OF THE ANALYST

	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	Mean
Blended	1%	1%	2%	7%	90%	97%	4.85
External	1%	1%	3%	8%	87%	95%	4.78
Internal	1%	1%	2%	7%	90%	97%	4.85

Satisfaction with THE TECHNICAL SKILLS/KNOWLEDGE OF THE ANALYST

	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	Mean
Blended	1%	1%	3%	8%	87%	95%	4.78
External	2%	2%	4%	11%	81%	92%	4.67
Internal	1%	1%	2%	9%	87%	96%	4.80

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Satisfaction with THE TIMELINESS OF THE SERVICE PROVIDED

	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	Mean
Blended	3%	2%	3%	8%	84%	92%	4.70
External	4%	2%	4%	10%	79%	89%	4.57
Internal	2%	2%	3%	9%	84%	93%	4.71

Satisfaction with THE QUALITY OF THE SERVICE PROVIDED

	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	Mean
Blended	2%	1%	2%	7%	87%	94%	4.76
External	4%	2%	4%	9%	81%	90%	4.62
Internal	2%	1%	2%	8%	87%	95%	4.78

Satisfaction with THE OVERALL SERVICE EXPERIENCE

	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	Mean
Blended	2%	2%	3%	8%	85%	93%	4.72
External	4%	3%	4%	10%	79%	89%	4.58
Internal	2%	1%	3%	9%	85%	94%	4.74

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Results by Size of Customer Base

This section reports the results based on the number of customers the support center supports, whether that customer base is internal, external, or blended. Though there is no linear relationship between satisfaction and the size of the customer base, it is interesting to note that customers of support centers in the medium range (2,000 to 10,000 customers) receive higher ratings than those in the lower (fewer than 2,000 customers) and higher (more than 10,000 customers) ranges. Across all three groups, however, analyst courtesy continues to top the list and timeliness continues to be the most difficult customer expectation to meet.

NUMBER OF CUSTOMERS SUPPORTED BY SUPPORT CENTER

	Number of Support Centers	Number of Companies	Number of Surveys
Small (fewer than 2,000)	173	79	50,630
Medium (2,000-10,000)	166	101	132,813
Large (more than 10,000)	107	58	144,380

Satisfaction with THE COURTESY OF THE ANALYST

	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	MeanX
Small (fewer than 2,000)	1%	1%	2%	7%	91%	98%	4.86
Medium (2,000 - 10,000)	1%	0%	2%	7%	91%	98%	4.86
Large (more than 10,000)	1%	1%	2%	7%	89%	96%	4.83

Satisfaction with THE TECHNICAL SKILLS/KNOWLEDGE OF THE ANALYST

	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	Mean
Small (fewer than 2,000)	1%	1%	3%	9%	87%	96%	4.79
Medium (2,000 - 10,000)	1%	1%	2%	8%	88%	96%	4.81
Large (more than 10,000)	1%	1%	3%	9%	86%	95%	4.76

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Satisfaction with THE TIMELINESS OF THE SERVICE PROVIDED

	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	Mean
Small (fewer than 2,000)	2%	2%	3%	9%	84%	93%	4.69
Medium (2,000 - 10,000)	2%	1%	3%	8%	86%	94%	4.74
Large (more than 10,000)	3%	2%	4%	9%	83%	92%	4.67

Satisfaction with THE QUALITY OF THE SERVICE PROVIDED

	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	Mean
Small (fewer than 2,000)	2%	1%	2%	8%	87%	95%	4.77
Medium (2,000 - 10,000)	2%	1%	2%	7%	88%	95%	4.80
Large (more than 10,000)	2%	2%	3%	8%	86%	94%	4.74

Satisfaction with THE OVERALL SERVICE EXPERIENCE

	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	Mean
Small (fewer than 2,000)	2%	2%	3%	9%	85%	94%	4.73
Medium (2,000 - 10,000)	2%	1%	3%	8%	86%	94%	4.76
Large (more than 10,000)	3%	2%	3%	9%	84%	93%	4.70

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Results by Customer Location

Many support centers provide service to customers not only at single locations, but at multiple locations, possibly in multiple countries. This section looks at customer satisfaction ratings based on customer location. Of the three types of customer demographics below, it appears that support centers with customers in multiple countries score slightly lower in customer satisfaction than those with customers in a single country. Language, culture, and time zone differences are challenges that organizations must face when providing service to customers in multiple countries.

CUSTOMER LOCATION

	Number of Support Centers	Number of Companies	Number of Surveys
Single site/single country	85	46	28,275
Multiple site/single country	224	110	171,454
Multiple countries	147	82	138,052

Satisfaction with THE COURTESY OF THE ANALYST

	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	Mean
Single site/single country	1%	0%	2%	5%	92%	97%	4.87
Multiple site/single country	1%	0%	1%	6%	91%	97%	4.87
Multiple countries	1%	1%	2%	8%	88%	96%	4.81

Satisfaction with THE TECHNICAL SKILLS/KNOWLEDGE OF THE ANALYST

	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	Mean
Single site/single country	1%	1%	2%	7%	89%	96%	4.81
Multiple site/single country	1%	1%	2%	8%	88%	96%	4.81
Multiple countries	1%	1%	3%	10%	84%	94%	4.74

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Satisfaction with THE TIMELINESS OF THE SERVICE PROVIDED

	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	Mean
Single site/single country	2%	2%	3%	8%	86%	93%	4.72
Multiple site/single country	2%	1%	3%	8%	85%	94%	4.74
Multiple countries	3%	2%	4%	10%	81%	91%	4.63

Satisfaction with THE QUALITY OF THE SERVICE PROVIDED


	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	Mean
Single site/single country	2%	1%	2%	6%	89%	95%	4.79
Multiple site/single country	2%	1%	2%	7%	88%	95%	4.80
Multiple countries	2%	2%	3%	9%	84%	93%	4.71


Satisfaction with THE OVERALL SERVICE EXPERIENCE

	1 (Very Dissatisfied)	2	3	4	5 (Very Satisfied)	Total Satisfaction (Combined 4/5 Percentage)	Mean
Single site/single country	2%	1%	3%	7%	87%	94%	4.75
Multiple site/single country	2%	1%	3%	8%	86%	94%	4.76
Multiple countries	3%	2%	4%	10%	82%	92%	4.66

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Appendix







Customer Satisfaction
Index Service

English (US)

Hello Example First Name,

Rocky Mountain Services has asked [HDI](#), an independent industry association, to randomly select closed incidents to better monitor customer satisfaction levels.

Incident #: SurveySample75493
Incident Closed: 1/17/2012 5:34 PM
Analyst: Example Agent Name
Incident Description: Website visitor is interested in seeing a CSI Survey.

How satisfied are you with:	 Very Dissatisfied				 Very Satisfied	N/A
The courtesy of the analyst?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The technical skills/knowledge of the analyst?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The timeliness of the service provided?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The quality of the service provided?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The overall service experience?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Was the issue resolved to your satisfaction?

Yes

No

Would you refer us to a friend or colleague?

Yes

No

Additional feedback

If you have further questions/issues, you may contact CSI Example Center directly at 719-555-2222 ext 1.
 Please have the support center contact me.

(Select N/A if this survey does not pertain to your experience.)

These represent "custom" questions, which may be created by each subscriber to gather additional data specific to their environment. Benchmarking data for custom questions is not included in this report.