Multidimensional Metrics: Measuring Efficiency, Quality, and Value

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Session Description

Are you using the right metrics and producing the right reports? What metrics should you use internally? Which metrics show the business value of what your team is doing? How do you ‘hit the numbers while still focusing on the quality of the customer experience? Attend this session to learn how to use metrics, monitoring, training, coaching, and continual communication to consistently deliver a high-quality customer experience that you can quantify and promote. Attendees will walk away with sample reports, quality scorecard templates, and a training checkliettangible tools that can be used to make an immediate impact. (Intermediate)

Speaker Background

Rae Ann Bruno is the President of Business Solutions Training and consults and trains in various areas of ITIL, Communications, Internal Marketing, Metrics and Process Improvement. Rae Ann holds several ITIL certifications, is a Faculty Trainer for HDI and authored the HDI focus books, Translating IT Metrics into Business Benefits and What Have You Done for Me Lately? Creating an Internal Marketing Culture. She is also a member of the HDI International Standards Committee.
Multi-Dimensional Metrics

What are multi-dimensional metrics?

- The way to assess your team’s:
  - Impact and value to the business
  - Efficiency
  - Success with Improvements
  - Maturity of processes
  - Quality
  - Adherence to procedures
  - Service Delivery Consistency
Multi-Dimensional Metrics

- Go beyond “a gut feel”
- Measure all aspects (holistic view):
  - Efficiency
  - Quality
  - Value
- Assess all aspects of service delivery
- “Tell a story”
- Drive improvements
- Show value

Keep in Mind:

- People will “hit the numbers”
  - There is often a direct correlation between metrics and behavior!
  - Align and re-align metrics (based on results/behavior)
- Measure Operations AND Quality AND Value
- No single metric is the “silver bullet”
- Key Performance Indicators are tied to GOALS
- Always focus on the big picture
  - Business value
  - The customer experience
High Level Steps

Reverse Your Approach
- Start with questions
- Use metrics and reports as the answers
- What metrics are available?
- What else is needed?
- It’s not how much, it’s how useful

Lay the Foundation
- Goals
- Monitoring
- Metrics
- Coaching
- Training
- Communication
- Continual Improvement

Reverse Your Approach

Questions
- Start with the Questions.
- What do you your stakeholders want to know?
- Understand what information is needed.
- Ask!

Review
- What reports do you have today that answer the questions?
- Which reports/metrics measure efficiency? effectiveness? Improvement? Results?
- What metrics can you use to “tell the story” or answer the questions?

Answer
- What can we answer today?
- What do we need to change?
- How are we performing? Where do we excel? What can we improve?
- What are we showing the business? I.T.? Our team?
### Efficiency

- Eliminate redundant efforts, unnecessary steps, and streamline efforts
- Measure consistently and regularly
- Include, assess, and improve within:
  - Processes (RACI, execution of steps)
  - Training
  - Continual Efforts
    - Meetings
    - Post Mortems
    - Issues

### Quality

- Baseline
- Call Monitoring
- Incident Monitoring
- Knowledge Monitoring
- Quality Index
- Coaching
- Alignment with goals
- Proper sense of urgency
- Customer Service Skills
- SLA/OLA compliance
- Service Review meetings and

### Value

- Customer Satisfaction
- Saved time
- Productivity
- Business impact
- Correlation to business needs
- WIIFM (What’s in it for me?)
- Accuracy
- Trending
  - Top types
  - Priority
- Cost
  - Per contact
  - To business
### Hector's Scorecard

<table>
<thead>
<tr>
<th>Process Activities</th>
<th>Cases Closed/week</th>
<th>Articles Linked/week</th>
<th>Articles Created/week</th>
<th>Articles Modified/week</th>
<th>Citations/week</th>
<th>Average Handle Time</th>
<th>% FCR</th>
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</thead>
<tbody>
<tr>
<td>Prepare and distribute monthly reports</td>
<td>SLM-PL-001</td>
<td>A,R</td>
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<tr>
<td>Update procedures in SOP</td>
<td>SLM-PL-002</td>
<td>A,R</td>
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<tr>
<td>Administer the SLM/SCM SharePoint site</td>
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<td>A,R</td>
<td>RC</td>
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<td>Maintain permissions in SharePoint</td>
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<td>Conduct and Document Service Reviews</td>
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<td>C</td>
<td>A,R</td>
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<tr>
<td>Request Reports on SAMS Service and Performance</td>
<td>SLM-PL-006</td>
<td>A,R</td>
<td>R</td>
<td>R</td>
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<tr>
<td>Establish and report on Process metrics</td>
<td>SLM-PL-007</td>
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<td>SAMS/SLA Repository</td>
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<tr>
<td>Provide regular Catalog updates on services in SAMS</td>
<td>SLM-SSR-001</td>
<td>A,R</td>
<td></td>
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<td></td>
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<tr>
<td>Propose and evaluate new features and functionality</td>
<td>SLM-SSR-002</td>
<td>A</td>
<td>C,R</td>
<td>C</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create Release Packages (features, fixes, updates, reports)</td>
<td>SLM-SSR-003</td>
<td>C</td>
<td>A,R</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: HDI KCS Course

![Hector's Scorecard Graph](image_url)
### Efficiency
- Ticket management
- First contact resolution (FCR)
- Utilization
- Time to resolution
- Accuracy
- Correct categorization, knowledge article, resolution
- Aging reports
- Reopened tickets
- Correct routing
- Process
- Appropriate prioritization
- First level

### Quality
- Baseline
- Call Monitoring
- Incident Monitoring
- Knowledge Monitoring
- Quality Index
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- Alignment with goals
- Proper sense of urgency
- Customer Service Skills
- SLA/OLA compliance
- Service Review meetings and

### Value
- Customer Satisfaction
- Saved time
- Productivity
- Business impact
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- Accuracy
- Trending
  - Top types
  - Priority
  - Cost
  - Per contact
  - To business

---

**Quality**

- MUST make the time!
- Putting processes in place is not enough. Quality metrics make sure they are being followed.
- Essential for cultural and behavior changes.
- Is defined by and measured by customer – very visible!
- Quality Metrics assess:
  - Consistency
  - How well we are doing
  - Maturity of process
  - Quality of skills/team members
- Coaching
- Job Rotations
- Training
# Sample Quality Monitoring Form

Type a 1 in the Yes or No column. Total each section with a total evaluation score of Yes or No responses.

### Greeting/Account Validation

1. Used the department-standard greeting.
2. Spoke in a pleasant, friendly tone of voice.
3. Confirmed entitlement and customer’s information in the incident management system.

### Incident Detection

1. Offered assistance.
2. Used appropriate questions.
3. Paraphrased the incident correctly.
4. Expressed empathy to the customer.
5. Assessed the technical impact of the incident.

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## KCS Knowledge Monitoring Team Report

**Date:** 5/6/2011

<table>
<thead>
<tr>
<th>Article Creator</th>
<th>Article Quality Index</th>
<th>Articles Reviewed</th>
<th>Rejected</th>
<th>Content Issues</th>
<th>Duplicate</th>
<th>Too Thin</th>
<th>Resolution not complete or usable</th>
<th>Compound Problem with Problem Description</th>
<th>Environment not to standard</th>
<th>Wordy</th>
<th>Too Specific</th>
<th>Multiple Style Issues</th>
<th>Customer can't see reference</th>
<th>Hyperlink incorrect</th>
<th>Audience incorrect</th>
<th>Other incorrect</th>
<th>Status incorrect</th>
<th>Source: HDI KCS Course</th>
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<td>8</td>
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</tr>
</tbody>
</table>

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Source: HDI KCS Course
Balanced Scorecard

- Ties performance measurements to strategy
- Survey operations from four, interlocking perspectives
- Review past performance and trends, and establish optimal forecasting

<table>
<thead>
<tr>
<th>Financial</th>
<th>Internal Business Process</th>
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</thead>
<tbody>
<tr>
<td>How do we look to our shareholders?</td>
<td>What must we excel at?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Customer</th>
<th>Learning and Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do customers see us?</td>
<td>Can we continue to improve and create value?</td>
</tr>
</tbody>
</table>

The key is in the balance—understanding how management decisions affect each of the four quadrants.

Source: HDI SCM Course
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- Ticket management
- First contact resolution (FCR)
- Utilization
- Schedule adherence
- Accuracy
- Correct categorization, knowledge article, resolution
- Aging reports
- Reopened tickets
- Correct routing
- Process
- Appropriate prioritization

### Quality
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### Value
- Customer Satisfaction
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- WIIFM (What’s in it for me?)
- Accuracy
- Trending
  - Top types
  - Priority
- Cost
  - Per contact
  - To business

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**Show Your Value**

Can you:

- Site specific business tasks that your team facilitates completing?
- Quantify the amount of time your team has helped them save?
- Measure productivity gains facilitated by your team?

Look for the metrics or information that you can use to quantify each of these.
The Customer Voice

• What do you expect when...?
• How can we make your job easier?
• How do our services currently save you time?
• Where could we help you to gain time?
• What is efficient/inefficient?
• If we could change one thing that would have a large impact on __, what would it be?

Business-focused reports

• What are the mission critical services, applications or business segments for the company?
• How could productivity impact be shown for those mission critical areas?
• What information would help to improve service?
Point of Sale (POS)

Incorrect Pricing
Missing Prices
Manual Fixes

Classroom Disruptions

Internet Access
Smartboard
Application
Slow response
Multi-dimensional Metrics

Putting it All Together

<table>
<thead>
<tr>
<th>Term</th>
<th>High Level Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baseline</td>
<td>Where you are today</td>
</tr>
<tr>
<td></td>
<td>Used for later comparison</td>
</tr>
<tr>
<td>Key Performance Indicator</td>
<td>Tied to goals</td>
</tr>
<tr>
<td></td>
<td>Should change as you mature</td>
</tr>
<tr>
<td>Benchmarking</td>
<td>Comparison to:</td>
</tr>
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<td></td>
<td>Other companies</td>
</tr>
<tr>
<td></td>
<td>Best practices</td>
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</table>
## Terms

<table>
<thead>
<tr>
<th>Term</th>
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<tbody>
<tr>
<td><strong>Baseline</strong></td>
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</tr>
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<tr>
<td><strong>Utilization</strong></td>
<td>Amount of time spent providing service to customer each day</td>
</tr>
</tbody>
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<table>
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</tbody>
</table>

*Multi-dimensional Metrics*

*Is your Service Desk good?*

*Yes, we have a great service desk!*

*What is great about them?*

*They usually have the right answers*  

*The customers are very happy with them*

*They do things really well*  

*They get better all the time*  

*They really care about the customer*
## Quantify Answers

<table>
<thead>
<tr>
<th>Answers</th>
<th>How do you measure it?</th>
</tr>
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<tbody>
<tr>
<td><strong>Care about Customer</strong></td>
<td>Call Monitoring&lt;br&gt;Customer Satisfaction/voice&lt;br&gt;Random “Follow ups”</td>
</tr>
<tr>
<td><strong>Usually have right answers</strong></td>
<td>First Contact Resolution (FCR)&lt;br&gt;First level resolvable?&lt;br&gt;Reopened tickets&lt;br&gt;Correct categorization&lt;br&gt;Ticket quality</td>
</tr>
<tr>
<td><strong>Customers are happy</strong></td>
<td>Customer satisfaction rating&lt;br&gt;Net Promoter Score&lt;br&gt;Opinion surveys&lt;br&gt;Voice of the customer</td>
</tr>
</tbody>
</table>
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<td><strong>Care about Customer</strong></td>
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<td>First level resolvable?</td>
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<td>Correct categorization</td>
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<td>Call monitoring</td>
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<td>Reopens</td>
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## Quantify Answers

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<thead>
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<th>Answers</th>
<th>How do you measure it?</th>
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<td><strong>Getting better all the time</strong></td>
<td>Base lining</td>
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<td>Benchmarking</td>
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<td>Key Performance Indicators (KPIs)</td>
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<td>Efficiency gains</td>
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<td>• Call duration</td>
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<td>• First contact resolution</td>
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<td></td>
<td>• First level resolvable</td>
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<tr>
<td></td>
<td>• After call work</td>
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<tr>
<td><strong>Do things well</strong></td>
<td>Quality scores</td>
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<td>Satisfaction scores</td>
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<td>Service level compliance</td>
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<td>Accuracy</td>
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<tr>
<td></td>
<td>Process adherence, etc.</td>
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## Quantify Answers

<table>
<thead>
<tr>
<th>Answers</th>
<th>How do you measure it?</th>
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<tr>
<td>Getting better all the time</td>
<td>Base lining, Benchmarking, Key Performance Indicators (KPIs)</td>
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<td>Efficiency gains</td>
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<td>• Call duration</td>
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<td>• First level resolvable</td>
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<td>• After call work</td>
</tr>
<tr>
<td>Do things well</td>
<td>Quality scores, Satisfaction scores</td>
</tr>
<tr>
<td></td>
<td>Service level compliance</td>
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<tr>
<td></td>
<td>Accuracy</td>
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<tr>
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<td>Process adherence, etc.</td>
</tr>
<tr>
<td></td>
<td>Customized business reports</td>
</tr>
</tbody>
</table>

### Summary

- Continually solicit the voice of the customer
- Grow your team’s business knowledge and skills on an ongoing basis
- Open communication, encourage engagement
- Balance quality and efficiency metrics
- Monitor, coach, adapt, measure, coach
- Learn the value of your services, quantify that value
Summary

- Provide information to the rest of I.T.
- Place full emphasis on the customer experience
- It’s about business, not technology (service)
- Define and redefine regularly
- Transparency is necessary to improve
- “You can’t manage what you don’t measure”
Thank you for attending this session.

Don’t forget to complete an evaluation form!

Rae Ann Bruno