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Session 210: Surveying the Customer Experience

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When properly managed, the survey process generates valuable feedback toward improving the quality services of the IS organization and better alignment of services to business requirements. If mismanaged, the process does more damage to the IS organization's reputation than if no survey had been distributed.

- Make it EASY. Make it part of Resolution Process. Make sure it takes less than 1 minute to complete.
- Survey 100% of the time for ALL incidents and requests.
- An opportunity to tell all about the real-time customer experience.
- When you ask, listen, analyze, take action, respond when necessary and make necessary changes going forward (Avoid Groundhog Day!).
- No Excuses, just listen, apologize and offer remediation.
- DON'T use surveys as an excuse not to connect personally with your customers.
- Utilize survey process to educate your customers on your scope of services, SLAs, current demand and how you manage the operational workload according to business priorities.
- The customer sees the Service Desk as THE IT organization. Utilize the survey process to engage other IT Assignment groups in sharing the customer experience with their team and how you can work together to improve it.





- The balanced scorecard is one tool for performance measurement and management.
- It provides a holistic approach and perspective to Performance Measurement by supplementing the traditional financial measures:
 - **Financial Perspective** — Is the company creating value for its shareholders?
 - **Customer Perspective** — How is the company performing from the perspective of those who purchase the company's products or services?
 - **Internal Business Process** — How is the company managing its internal business processes to meet its client's expectations? Is throughput improving?
 - **Innovation and Learning Perspective** — Is the company improving its ability to innovate, improve, and learn?
- It incorporates both leading and lagging indicators.
- The emphasis is on balance across multiple dimensions of performance; ensuring that good performance in one area is not offset by poor performance elsewhere.
- It is the strategy that drives the choice of performance measures.

<p>Reduce Operational Costs Budget variances I&O spend as a % of revenue DC Power usage effectiveness % projects delivered on time Unit costs of IT services</p> <p>Strengthen Business Partnership % of projects with business partner signoff % of projects in queue vs. completed % of regular IT planning meetings with business involvement Participation of execs in annual planning process</p> <p>Improve Customer Satisfaction Service Desk satisfaction score Customer satisfaction score End user performance management Number of service complaints Number of outstanding actions against last service review</p> <p>Deliver Quality Services Service availability/downtime Number of service outages created by human error Number of outstanding actions from last SLA review Number of service interruptions or performance degradation mapped to change requests % of SLAs without service-level breaches</p>	<p>The value perspective</p> <p>Objectives: Reduce Operational costs Strengthen the business partnership</p>	<p>The operational excellence perspective</p> <p>Objectives: Achieve process excellence Maintain high levels of responsiveness</p>	<p>Achieve process excellence # changes deployed vs. backed out # emergency changes # of repeat production issues # of unauthorized changes detected % problems with a root cause identified</p> <p>Maintain high levels of responsiveness Mean time to detection Mean time to acknowledgement Mean time to repair Mean time between failures Mean time to provision services Service desk abandonment rate First Call resolution rates Problem queue rate</p>
<p>The user orientation perspective</p> <p>Objectives: Improve customer satisfaction Deliver quality services to customer requirements</p>	<p>The future orientation perspective</p> <p>Objectives: Improve staff effectiveness Become more proactive</p>	<p>Improve Staff Effectiveness # of incidents per incident analyst Service to service admin ratio Average # of training days per employee Ratio of annual IT investment to annual spend on staff training % of roles that meet or exceed competency model</p> <p>Become more proactive % of operating budget spent on new initiatives and projects % of costs associated with IT maintenance % of staff with completed personal development plans % of projects in innovation pipeline % of projects that come out of innovation pipeline % of proactively solved incidents</p>	

The Balance Scorecard Approach and Methodology - The Importance of Perspective

The purpose of Transactional Customer Satisfaction Survey is to measure the real-time customer perspective on a recent customer experience that we can track, measure, improve and take action when required.

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Transactional Customer Satisfaction Surveys are a great way to measure the Service Desk's performance and to provide the team with real feedback on how they are delivering against the customer's expectations of their desired customer experience.

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Most Transactional Surveys are web-based and maybe have 5-7 questions that are targeted specifically to the Incident Management process steps.

They are followed by the Service Desk Professional follows during the course of a reported incident or request by the customer.

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The Transactional Survey link is usually delivered in the body of the email note explaining the purpose and value of their feedback. It is auto generated upon the incident/request being resolved.

Any customer dissatisfaction can be identified immediately and the recovery process can be initiated.

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The fact that we are surveying our customers demonstrates our commitment to the importance of the Voice of the Customer (VOC).

To be most effective, we must read every survey that requires our attention (bad scores, negative comments or checked contact me box) and respond accordingly.

This shows we care about our customers and the service we deliver to them.

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Survey Request Email



Hello Benjamin,

Application Support Desk has asked HDI, an Independent Industry association, to randomly select closed incidents to better monitor customer satisfaction levels. Your response will help First American improve service quality.

My organization is committed to providing timely and quality IT services to our First American employees. In addition to meeting and measuring adherence to service levels, we are always interested in hearing about your service experience. Please take one minute to complete our customer satisfaction survey to help us continuously improve the quality of our service delivery. Our management reads and reviews every submitted survey and responds promptly to any customer who is dissatisfied with the service, requesting someone contact them or providing comments that warrant a personal follow-up call.

I wanted to thank you in advance for taking the time to provide us with feedback with respects to your service experience. Please follow our IT Customer Service team on the IT Help Center on [FALive](#).

Mathew Beall
VP, Corporate IT Infrastructure

SPECIAL NOTE: Please pay special attention to the emoticons (sad face (1), smiley face (5)) when making your responses.

Incident # REQ0859362 closed on 11/23/2015 3:57 PM
Incident Desc: Bomgar training

[Take Survey Now](#)

Thank you for participating in this survey; First American values your opinion. Should you have any questions, please feel free to contact [Application Support Desk](#) at 866-462-7347.

The Survey Request Email is critical to getting the attention of the end user to complete the survey.

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CSI Survey - Windows Internet Explorer

https://www.thinkhdi-csi.com/ShowSurvey.aspx?req=Dn14%2bCOEub%2bT%2b77rok%2bPz23rbgAOCT21nR0P1k%3d

File Edit View Favorites Tools Help

Google Search Web

Links AOL for Broadband Custom Links Free Hotmail Snapshot Marquee Snapshot Window Windows Windows Marketplace Windows Media

Search Search Music Free Music Free Radio Backstage Pass Music Alerts

HDI Customer Satisfaction Index

Rocky Mountain Services

English Deutsch 日本語 Français Svenska Español Italiano

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 #: SurveySample913
Incident closed: 4/2/2008 8:23 PM
Incident description: Website visitor is interested in seeing a CSI Survey in English.

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

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.

Submit N/A

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

From: www.thinkhdi-csi.com <csialertsmler@thinkhdi-csi.com> Sent: Fri 3/27/2015 1:25 PM
To: Cruise, Mary L.; Pusch, Wade; McGarahan, Peter J.
Cc:
Subject: CSI Survey Alert

A survey was submitted that matched one or more alert values: [Click here to view the survey.](#)

Survey Answers (Red answers triggered this alert):

- Courtesy: 5
- Knowledge: 5
- Timeliness: 5
- Quality: 5
- Overall: 5
- **Additional Feedback: Mark Brown is very knowledgeable, professional and courteous. It is a pleasure to work with him. At the PFSC, we are all very pleased with his high standard of customer service and technical support. Cannot say enough positive statements about Mark.**
- Contact Me: Not Checked

Support Center: Personal Computing - Provisioning
Incident #: RITM0244120
Closed Date: Monday, March 16, 2015 9:16:46 AM
Customer: Rachele Arnold
Agent1: Personal Computing Provisioning
OrgMaj: Corp
OrgMin: Personal Computing Provisioning
OrgSub: Personal Computing Provisioning
Location: TCORP

A "GOOD" Survey
requires recognition
and rewards.

From: www.thinkhdi-csi.com
 To: Lee, Don; Cruse, Mary L.; Caudle, Brandon; McGarahan, Peter J.
 Subject: CSI Survey Alert
 Date: Friday, March 27, 2015 5:18:34 AM

A survey was submitted that matched one or more alert values: [Click here to view the survey.](#)

Survey Answers (*Red answers triggered this alert*):

- Courtesy: 3
- **Knowledge: 1**
- Timeliness: 3
- **Quality: 1**
- **Overall: 1**
- **Additional Feedback: called because my password wasn't working. after giving me a generic password for my laptop he guided me through using that on my phone/ipad for outlook. He never followed up on what I do with my laptop as the generic password didn't work for my laptop but only worked for outlook.**
- Contact Me: Not Checked

Support Center: Service Desk
Incident #: REQ0653264
Closed Date: Thursday, March 26, 2015 10:42:01 PM
Customer: Jeffrey Emenaker
Agent1: Debashis Basu (DBasu)
OrgMaj: Corp
OrgMin: Service Desk - After Hours
OrgSub: Service Desk - After Hours
Location: NCSO

**A "BAD" Survey
requires recognition
and rewards.**

1. To ensure that all Managers accountable for the customer experience follow the same procedure for immediately following up with any customer that:
 - Checks the Contact Me box
 - Writes a Comment
 - Scores a "1" for any survey question
 - Scores a "5" for all survey questions
2. If a poor experience, contact customer and recover and resolve to their satisfaction.
 - Understand the root of failure and follow-up for coaching or process improvement.
3. If a great experience, reach out to the Analyst and recognize their performance with a Thank You! Also, reach out to customer to thank them for taking the time to submit a survey response and that you shared it with the Analyst.



Follow-up Action Items	Contact Date	Resulting Action	Resolved Date
Follow-up with customers who have scored a "1" in any question, checked the Contact Me box or wrote a comment.			
Select a good sample size of unsatisfied scores and do a complete review of the ticket and call recording.			
Recognize all Analysts who have scored all "5s."			
Investigate any questions that have been scored with a high number of "1s."			



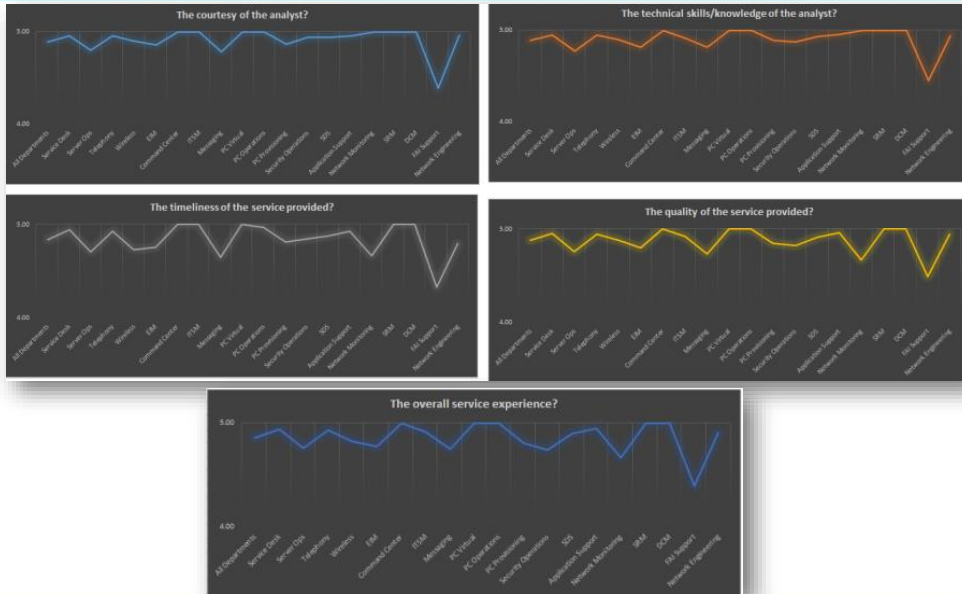
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Customer Satisfaction Survey Results (CSI)

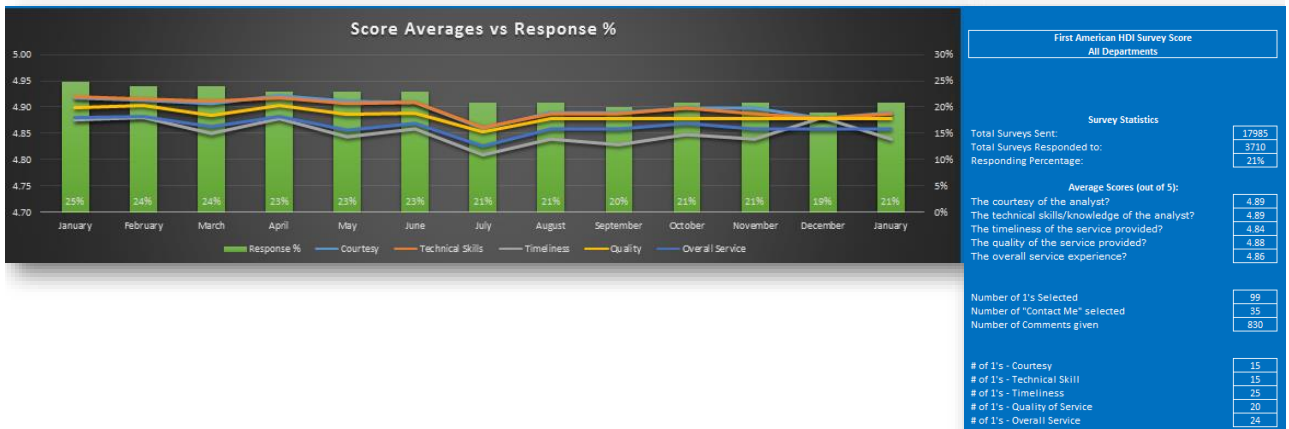
January 2015

	All Departments	Service Desk	Server Ops	Telephony	Wireless	ITIM	Command Center	TSM	Messaging	PC Virtual	PC Operations	PC Provisioning	Security Operations	FIS	Application Support	Network Monitoring	SRM	SDM	IT Support	Network Engineering
The courtesy of the analyst?	4.89	4.96	4.80	4.96	4.90	4.86	5.00	5.00	4.79	5.00	5.00	4.87	4.94	4.94	4.96	5.00	5.00	5.00	4.39	4.97
The technical skills/knowledge of the analyst?	4.89	4.95	4.78	4.95	4.90	4.82	5.00	4.92	4.82	5.00	5.00	4.89	4.88	4.93	4.96	5.00	5.00	5.00	4.45	4.94
The timeliness of the service provided?	4.84	4.94	4.71	4.93	4.73	4.76	5.00	5.00	4.65	5.00	4.97	4.81	4.85	4.88	4.93	4.67	5.00	5.00	4.33	4.80
The quality of the service provided?	4.88	4.95	4.76	4.94	4.88	4.80	5.00	4.92	4.73	5.00	5.00	4.85	4.82	4.91	4.96	4.67	5.00	5.00	4.49	4.94
The overall service experience?	4.86	4.94	4.76	4.93	4.83	4.78	5.00	4.92	4.75	5.00	5.00	4.81	4.74	4.90	4.95	4.67	5.00	5.00	4.39	4.91

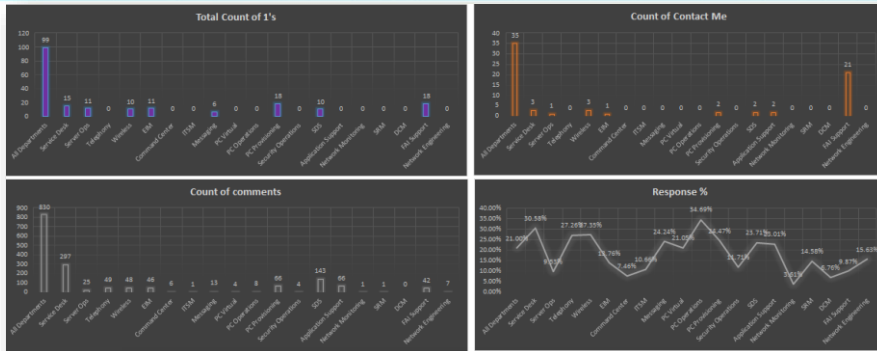
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January 2015

	IT Departments	Service Desk	ITSM	ITIL	ITIL Best Practices	ITIL Framework	ITIL Implementation	ITIL	ITIL Best Practices	ITIL Framework	ITIL Implementation	ITIL	ITIL Best Practices	ITIL Framework	ITIL Implementation	ITIL	ITIL Best Practices	ITIL Framework	ITIL Implementation	
Survey's Sent	1793	4134	629	741	574	1831	489	122	165	37	88	993	295	2629	1758	83	48	31	2939	224
Responses	3715	1264	79	202	157	252	35	13	40	2	24	241	35	576	404	3	7	3	282	55
Response %	21.02%	30.80%	9.33%	27.24%	27.35%	13.76%	7.48%	10.86%	24.24%	21.02%	34.89%	24.47%	11.71%	23.72%	23.03%	3.81%	14.58%	6.76%	9.67%	13.81%
Total Count of 1's	89	18	11	10	10	18	10	0	10	0	18	0	0	10	0	0	0	18	0	0
Count of Contact Me	35	2	1	0	2	1	0	0	0	0	2	2	0	0	0	0	0	21	0	0
Count of comments	830	287	25	49	48	96	6	1	13	4	8	66	4	343	88	1	1	0	42	7
# of 1's - Courtesy	11	0	2	0	1	0	0	0	1	0	0	3	0	2	0	0	0	0	4	0
# of 1's - Technical Skill	11	2	1	0	1	0	0	0	1	0	0	4	0	1	0	0	0	0	2	0
# of 1's - Timeliness	25	2	3	0	4	2	0	0	2	0	0	3	0	2	0	0	0	0	5	0
# of 1's - Quality of Service	20	4	2	0	2	3	0	0	1	0	0	3	0	3	0	0	0	0	3	0
# of 1's - Overall Service	24	3	1	0	1	4	0	0	1	0	0	5	0	2	0	0	0	0	4	0

- Easily measure your customer experience and satisfaction.
- Embedded in the Incident/Request management process.
 - When a ticket is closed, this user-friendly, secure, web-based, third party (objective) service automatically surveys your customer.
- Allows us to set alerts to immediately know when a customer responds unfavorably.
- Immediately access or schedule turnkey reports that are emailed to all accountable managers.
- Benchmark our performance against established goals and other companies both in and outside our vertical.
- Works seamlessly with our ServiceNow instance.
- Runs on an SSL server for security.



<https://www.thinkhdi.com/services/customer-satisfaction-index.aspx>





Never Arrive

Forward movement, progression and thinking!

**If you don't like change, you're going to like irrelevance even less.
..... General Eric Shinseki**

- Our Minds are programmed to achieve goals, to arrive, to be finished – then.....be done, relax, chill, hang-out.
 - “Arrival” is synonymous with stagnancy.
- Always changing, Always challenging, Always new, Always opportunities, Always growing!

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this session.***

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