



# *The Role of IT Leadership in Service and Support*



**MetricNet™**  
Performance Benchmarking



Sacramento

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<http://www.metricnet.com/sachdi/>



# 27 Years of IT Service and Support Benchmarking Data



Global Database

More than 3,700 IT Service and Support Benchmarks

70+ Key Performance Indicators

More than 120 Industry Best Practices



# The Maturity Continuum in IT Service and Support

## Reactive Stage



- Newer and less evolved support organizations are in this category
- A reactive “fire-fighting” mentality prevails at this stage
- Focus tends to be almost exclusively on service level compliance
- Support is continuously playing catch-up with user needs and expectations

## Growth Stage



- Heavy investments in training, tools, and metrics characterize this stage
- A knowledge base of problem solutions is typically established
- An expert network of problem solvers is developed outside of support
- User self-help begins: user-enabled password resets, user searchable knowledge base

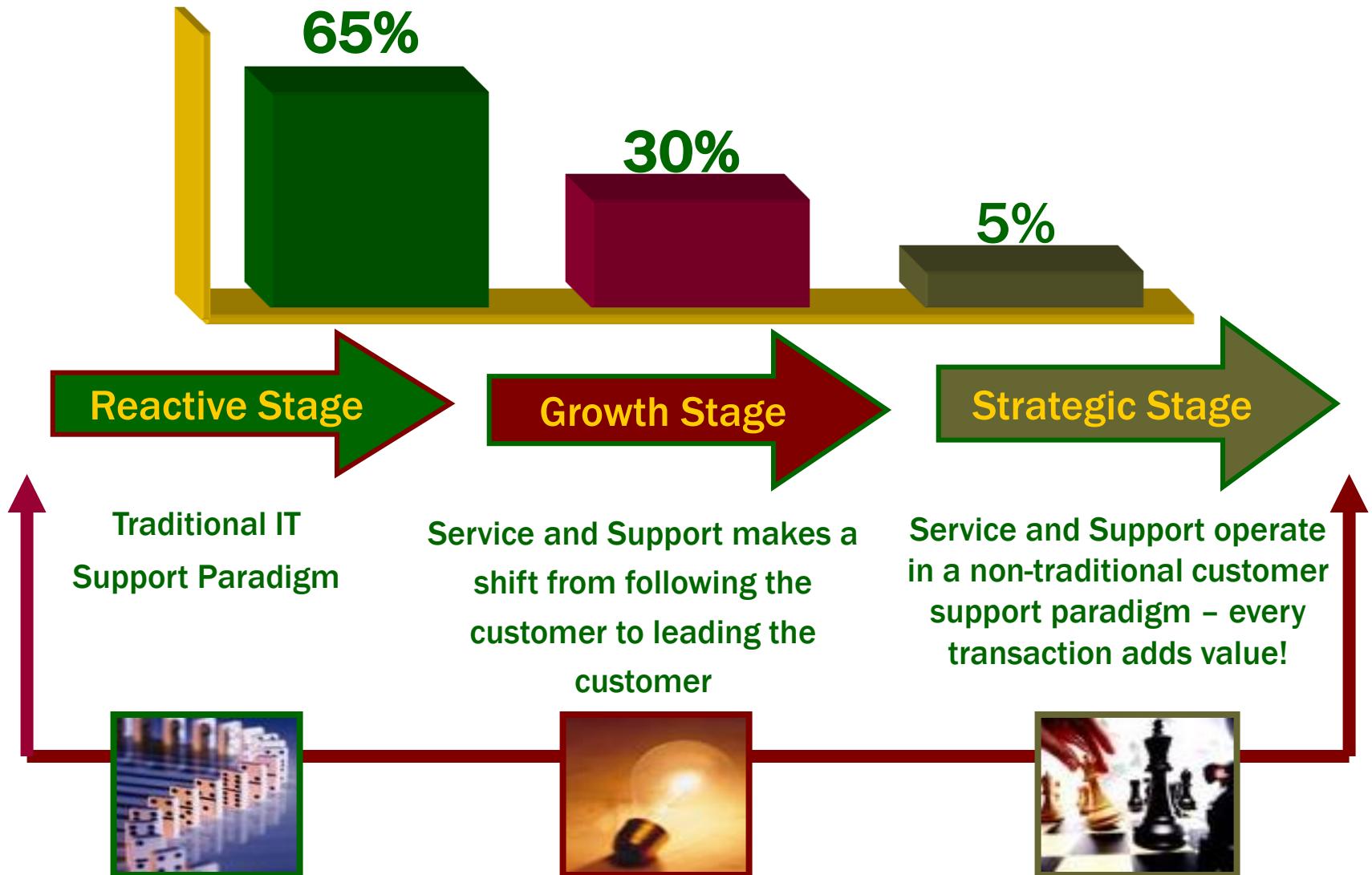
## Strategic Stage



- The primary purpose of a strategic support organization is to make end users more productive, and to drive a positive view of IT
- A preventive, proactive culture prevails
- Support anticipates user needs and expectations, and provides services accordingly
- Customer enthusiasm and value creation is the goal!



# Most Support Organizations are Tactical and Reactive



# What Does Effective Leadership Look Like?

1. Think of Service and Support as a Business – And Act Accordingly!
2. Understand the Economic Potential of Service and Support
3. Demand Business Results and Accountability
4. Become Conversant in the KPI's of Service and Support
5. Think Holistically – End-to-End Support Process
6. Define and Set Expectations
7. Expect Strategic Thinking and Proactivity
8. Manage the Message of Service and Support
9. Dedicate Time and Attention to the Function

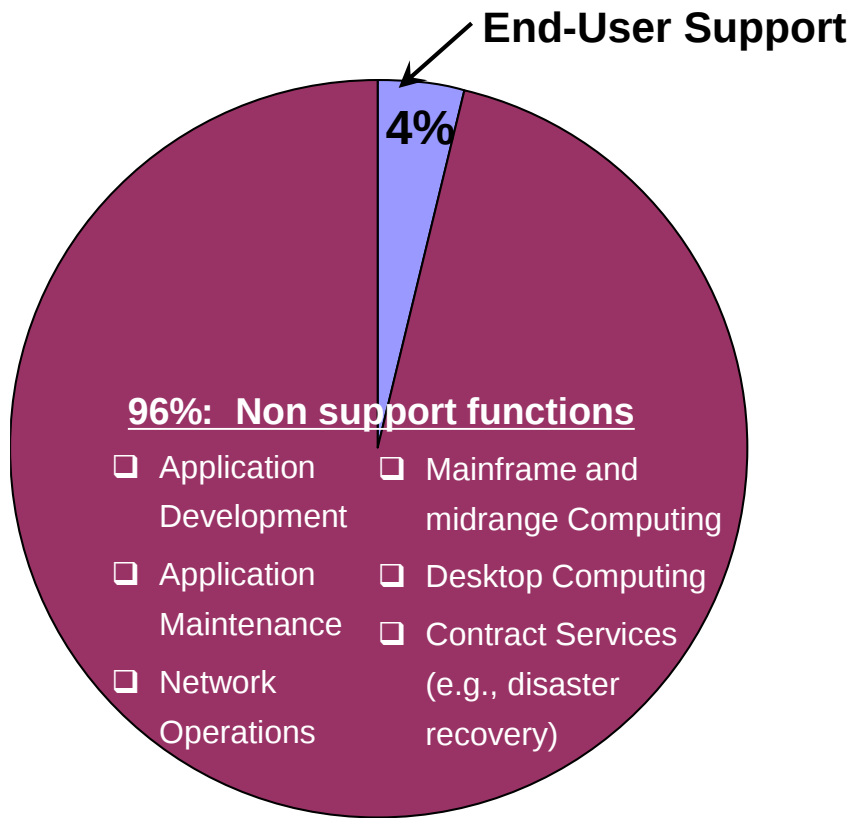


# What Does Effective Leadership Look Like?

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# The Paradox of IT Support



**Corporate IT Spending Breakdown**

- ❑ Less than 5% of all IT spending is allocated to end-user support
  - Service desk, desktop support, field support
- ❑ This leads many to erroneously assume that there is little upside opportunity in IT support
- ❑ The result is that most support organizations are managed with the goal of minimizing costs
- ❑ But the most effective support strategies focus on maximizing value



# The Emergence of Service Desk as a Value Center

## Cost Center

- ❑ Responsible for cost control
- ❑ Not responsible for...
  - Revenue generation
  - Profits
  - Investment decisions

VS.

## Value Center

- ❑ Creates value
- ❑ Demonstrates value
  - Cost savings
  - Cost Benefit Analysis
  - ROI Analysis

- ❑ The vast majority of service and support organizations operate as cost centers
  - They are expected to control costs, but are not expected to make any explicit financial contribution to the enterprise
- ❑ The focus in a cost center is on minimizing costs
- ❑ The focus in a Value Center is on maximizing value!
- ❑ The industry megatrend now is on creating and demonstrating economic value



# Service and Support as a Business



# Understand the Economic Potential of Service and Support

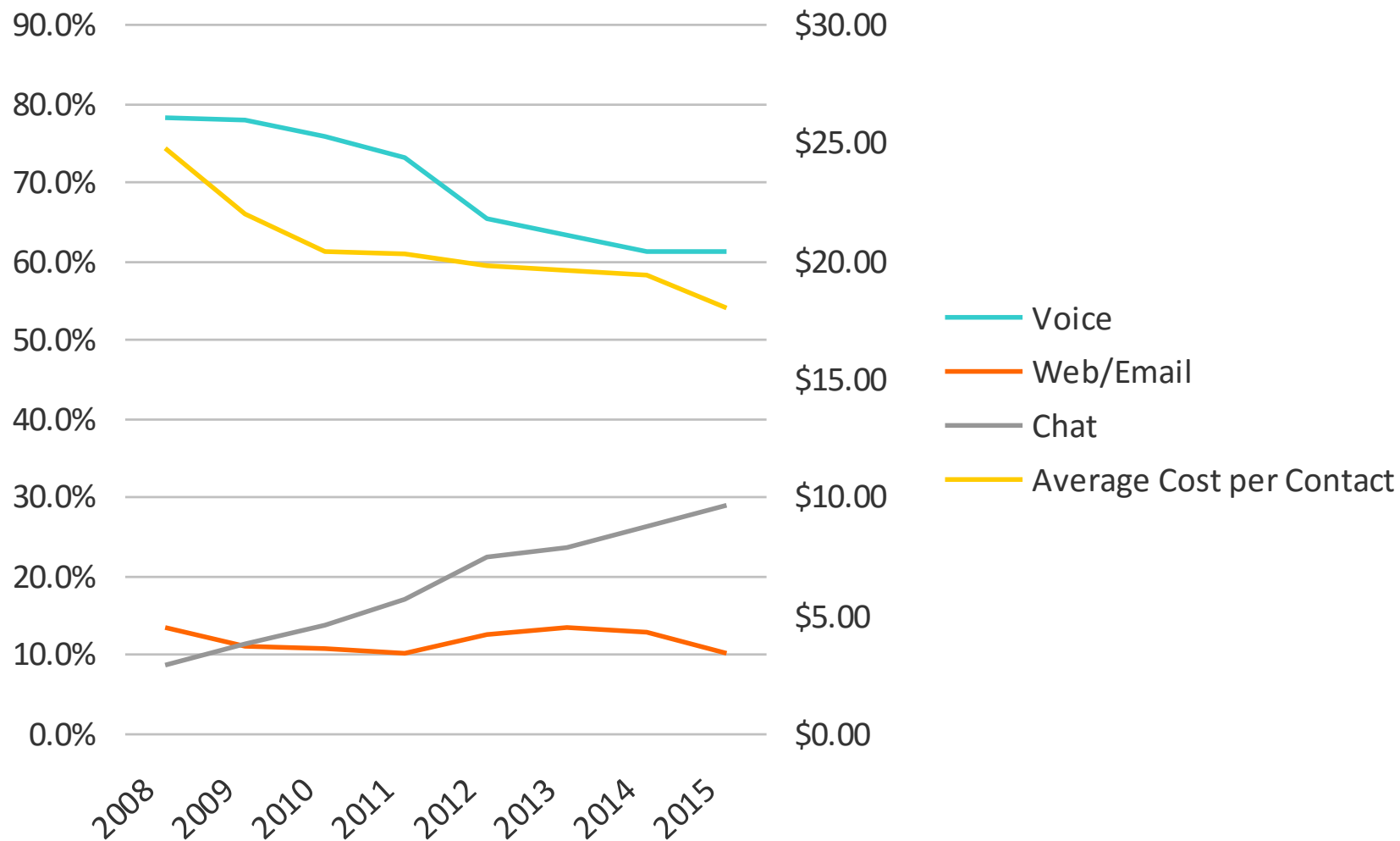
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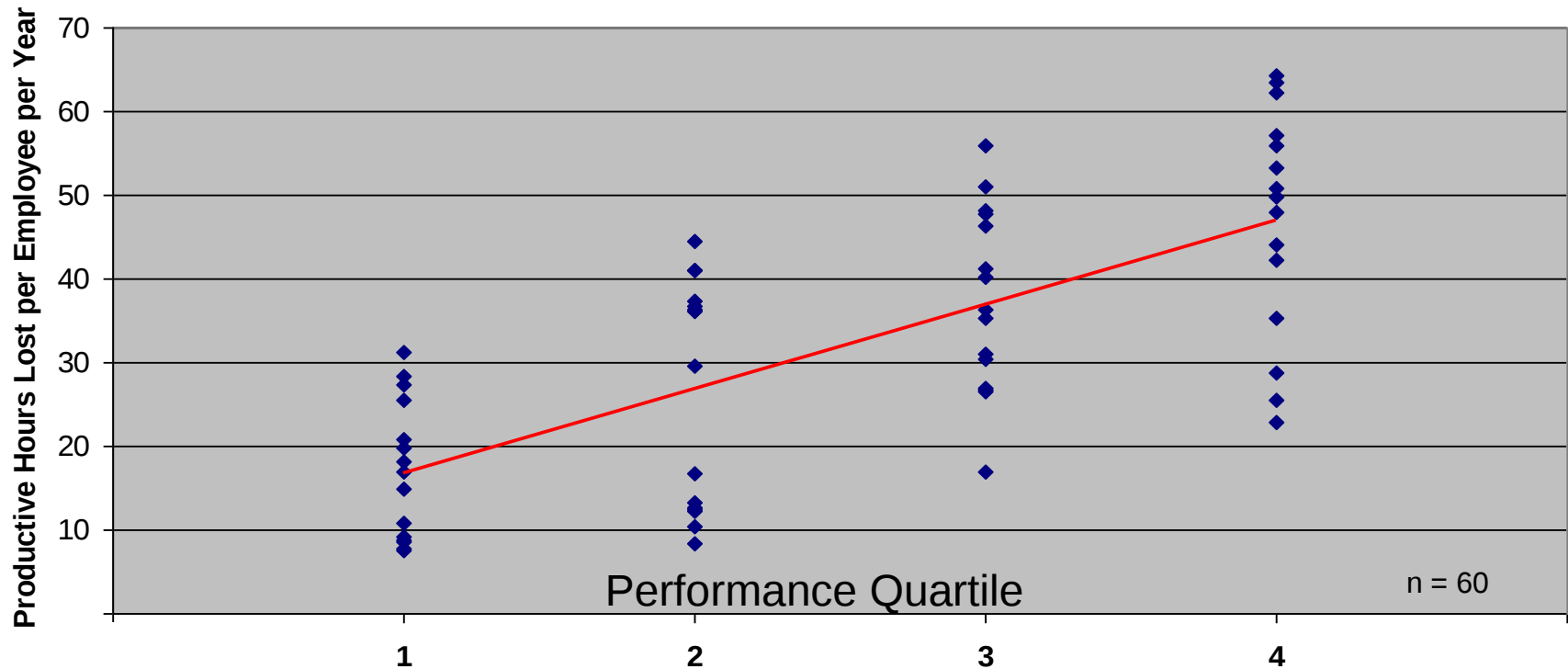
# Shift Left Reduces Total Cost of Ownership



## Contact Deflection into Lower Cost Channels



# Quality of Support Drives End-User Productivity



| Support Function                                    | Key Performance Indicator     | Performance Quartile |       |       |            |
|-----------------------------------------------------|-------------------------------|----------------------|-------|-------|------------|
|                                                     |                               | 1 (top)              | 2     | 3     | 4 (bottom) |
| Service Desk                                        | Customer Satisfaction         | 93.5%                | 84.5% | 76.1% | 69.3%      |
|                                                     | First Contact Resolution Rate | 90.1%                | 83.0% | 72.7% | 66.4%      |
|                                                     | Mean Time to Resolve (hours)  | 0.8                  | 1.2   | 3.6   | 5.0        |
| Desktop Support                                     | Customer Satisfaction         | 94.4%                | 89.2% | 79.0% | 71.7%      |
|                                                     | First Contact Resolution Rate | 89.3%                | 85.6% | 80.9% | 74.5%      |
|                                                     | Mean Time to Resolve (hours)  | 2.9                  | 4.8   | 9.4   | 12.3       |
| Average Productive Hours Lost per Employee per Year |                               | 17.1                 | 25.9  | 37.4  | 46.9       |

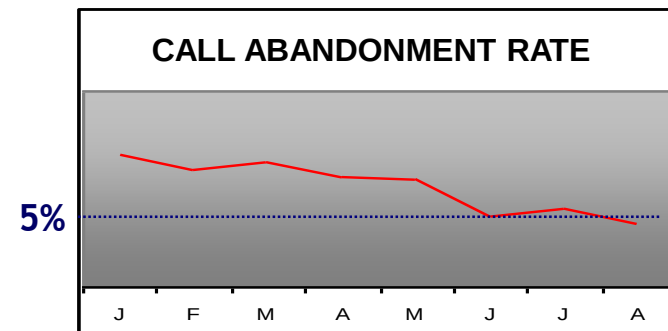
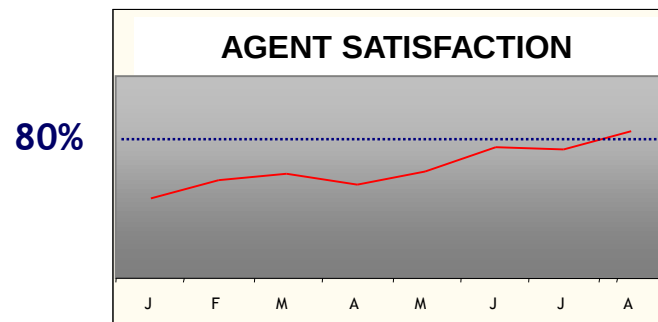
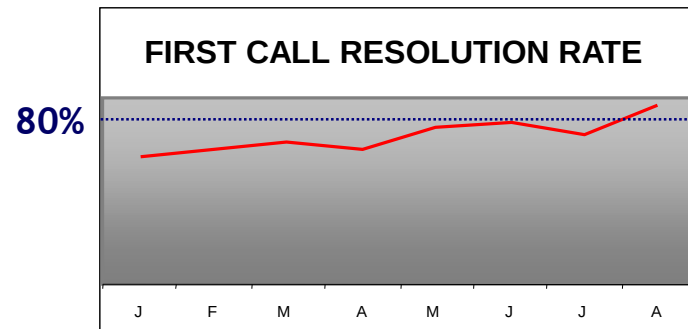
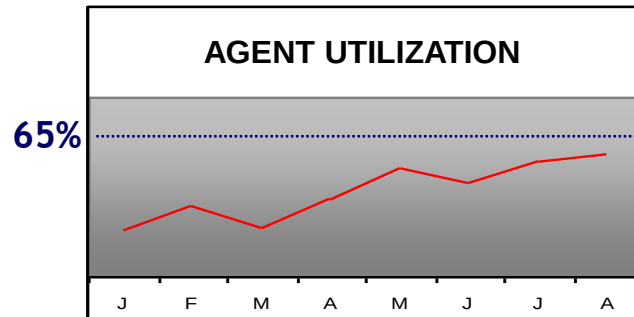
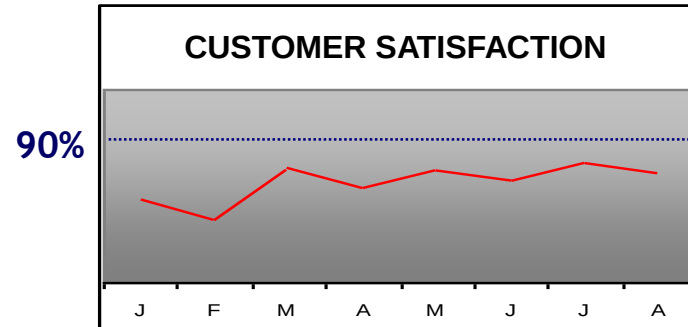
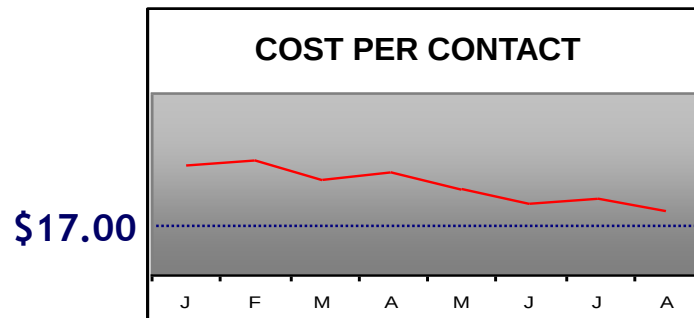


# Demand Business Results and Accountability

- 
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# Tracking, Trending and Reporting: Not Good Enough!





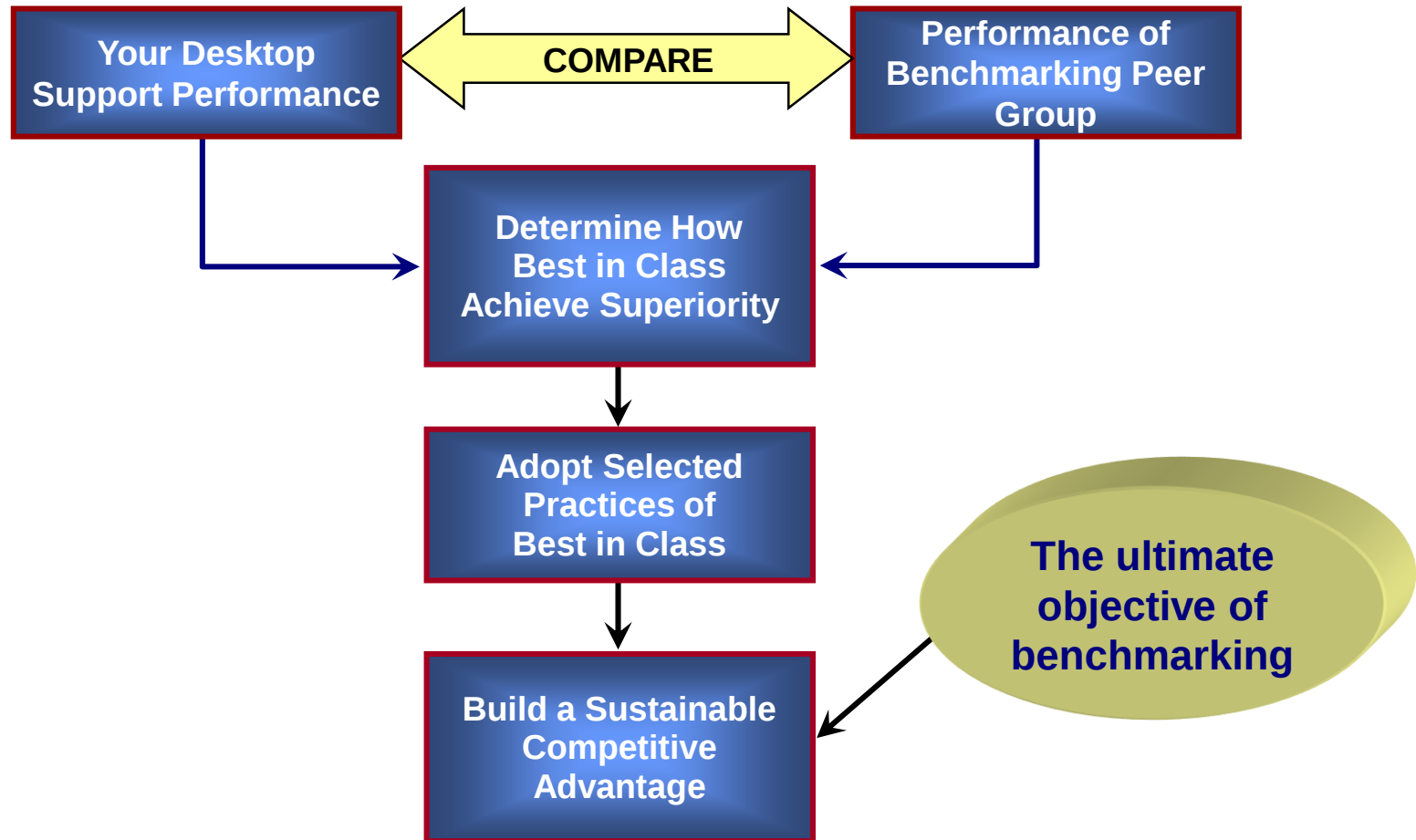
## The Widespread Adoption of Benchmarking

**Fewer than 20% of all IT support groups engage in benchmarking.**

***Yet there is a 1:1 Correspondence  
Between Benchmarking and World-  
Class Performance!***



# The Widespread Adoption of Benchmarking



## ROI: Prove it Or Lose It!

$$\text{ROI} = \frac{\text{Return}}{\text{Investment}} = \frac{\text{Savings}}{\text{Spending}}$$

- ❑ ROI is a simple ratio
- ❑ It requires quantification of Return (Savings), and Investment (Spending)
- ❑ It is measured over a one-year timeframe (One Year ROI is implied in the metric)
- ❑ It is one of the most widely used and accepted financial metrics
- ❑ It can be used *prospectively*, as part of a Business Case Analysis
- ❑ ...Or *retrospectively* to evaluate past business performance



# Become Conversant in the KPI's of Service and Support

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# The Premise Behind Service and Support KPI's

We've all heard the expression...

*“If you're not measuring it,  
you're not managing it!”*

But there's more to the story...Lots more!



# The Dilemma with Service and Support KPI's

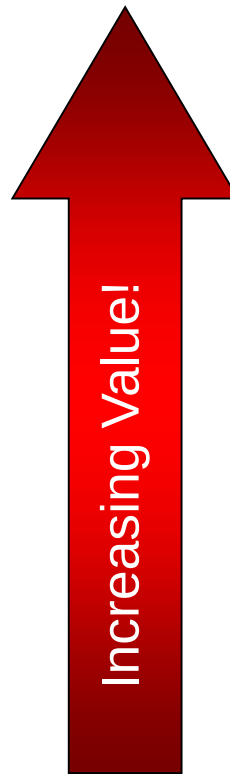
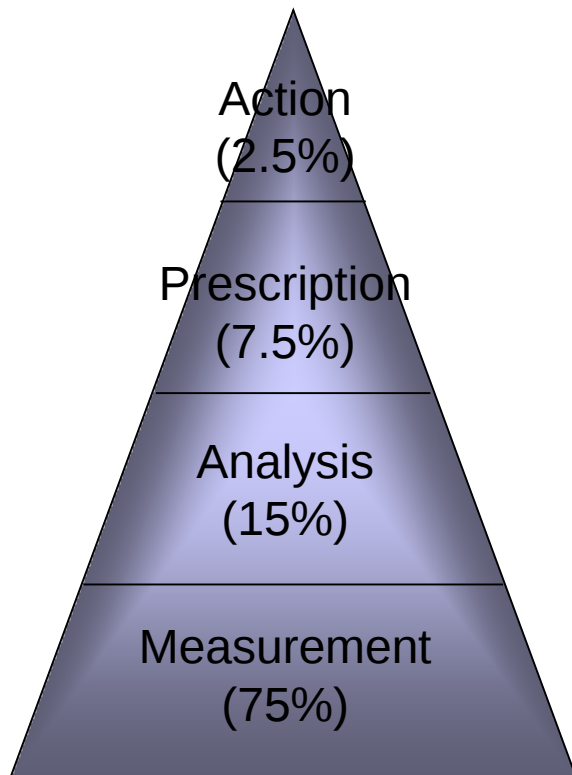
## Lots and Lots of data

- But not enough analysis...
- Not enough Insight...
- And not enough Action!!

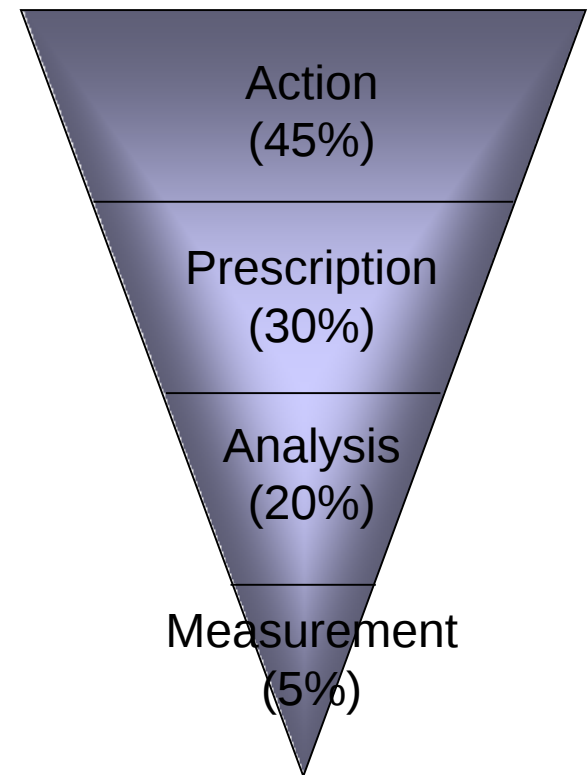


# Two Paradigms for Service and Support KPI's

The Historical Approach



The Holistic Approach



# Some Common Service Desk Metrics

## **Cost**

- Cost per Ticket
- First Level Resolution Rate

## **Quality**

- Customer Satisfaction
- Call Quality
- First Contact Resolution Rate

## **Productivity**

- Contacts per Agent per Month
- Agent Utilization
- Agents as % of Total FTE's

## **Agent**

- Agent Occupancy
- Annual Agent Turnover
- Daily Absenteeism
- New Agent Training Hours
- Annual Agent Training Hours
- Schedule Adherence
- Agent Tenure
- Agent Job Satisfaction

## **Service Level**

- Average speed of answer (ASA)
- Call abandonment rate
- % Answered within 30 Seconds
- Average hold time
- Average time to abandon
- Percent of calls blocked

## **Call Handling**

- Contact Handle Time
- % Escalated Level 1 Resolvable
- User Self-Service Completion Rate

**And there are hundreds more!!**



# The 80/20 Rule for Service Desk KPI's

## **Cost**

- Cost per Ticket

## **Quality**

- Customer Satisfaction

## **Productivity**

- Agent Utilization

## **Call Handling**

- First Contact Resolution Rate

## **TCO**

- First Level Resolution Rate

## **Agent**

- Agent Job Satisfaction

## **Aggregate**

- Balanced scorecard

Read MetricNet's whitepapers on IT Support KPI's. Go to [www.metricnet.com](http://www.metricnet.com) to download your copy!



# Aggregate Metrics: The Balanced Scorecard

| Performance Metric                | Metric Weighting | Performance Range |            | Your Performance | Metric Score | Balanced Score |
|-----------------------------------|------------------|-------------------|------------|------------------|--------------|----------------|
|                                   |                  | Worst Case        | Best Case  |                  |              |                |
| Cost per Contact                  | 25.0%            | \$55.28           | \$9.15     | \$21.83          | 72.5%        | 18.1%          |
| Customer Satisfaction             | 25.0%            | 63.7%             | 97.5%      | 77.2%            | 39.9%        | 10.0%          |
| Agent Utilization                 | 15.0%            | 30.9%             | 64.4%      | 47.0%            | 48.0%        | 7.2%           |
| Net First Contact Resolution Rate | 15.0%            | 51.8%             | 87.5%      | 70.2%            | 51.4%        | 7.7%           |
| Agent Job Satisfaction            | 10.0%            | 53.5%             | 91.5%      | 73.4%            | 52.4%        | 5.2%           |
| Average Speed of Answer           | 10.0%            | 192               | 13         | 60               | 73.5%        | 7.3%           |
| <b>Total</b>                      | <b>100.0%</b>    | <b>N/A</b>        | <b>N/A</b> | <b>N/A</b>       | <b>N/A</b>   | <b>55.6%</b>   |

**Step 1**

Six critical performance metrics have been selected for the scorecard

**Step 2**

Each metric has been weighted according to its relative importance

**Step 3**

For each performance metric, the highest and lowest performance levels in the benchmark are recorded

**Step 4**

Your actual performance for each metric is recorded in this column

**Step 5**

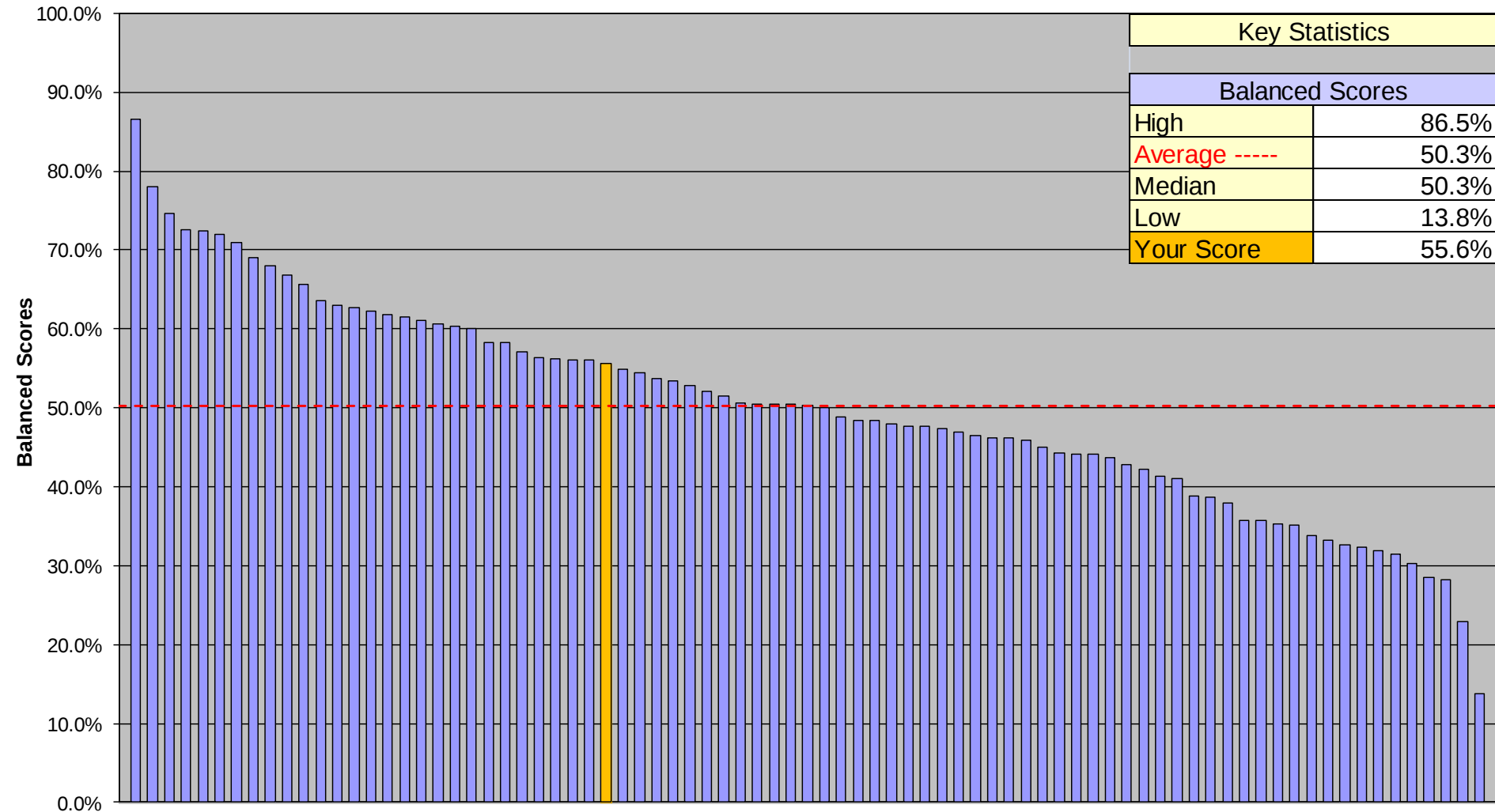
Your score for each metric is then calculated:  

$$\text{Metric Score} = \frac{\text{Worst Case} - \text{Actual Performance}}{\text{Worst Case} - \text{Best Case}} \times 100$$

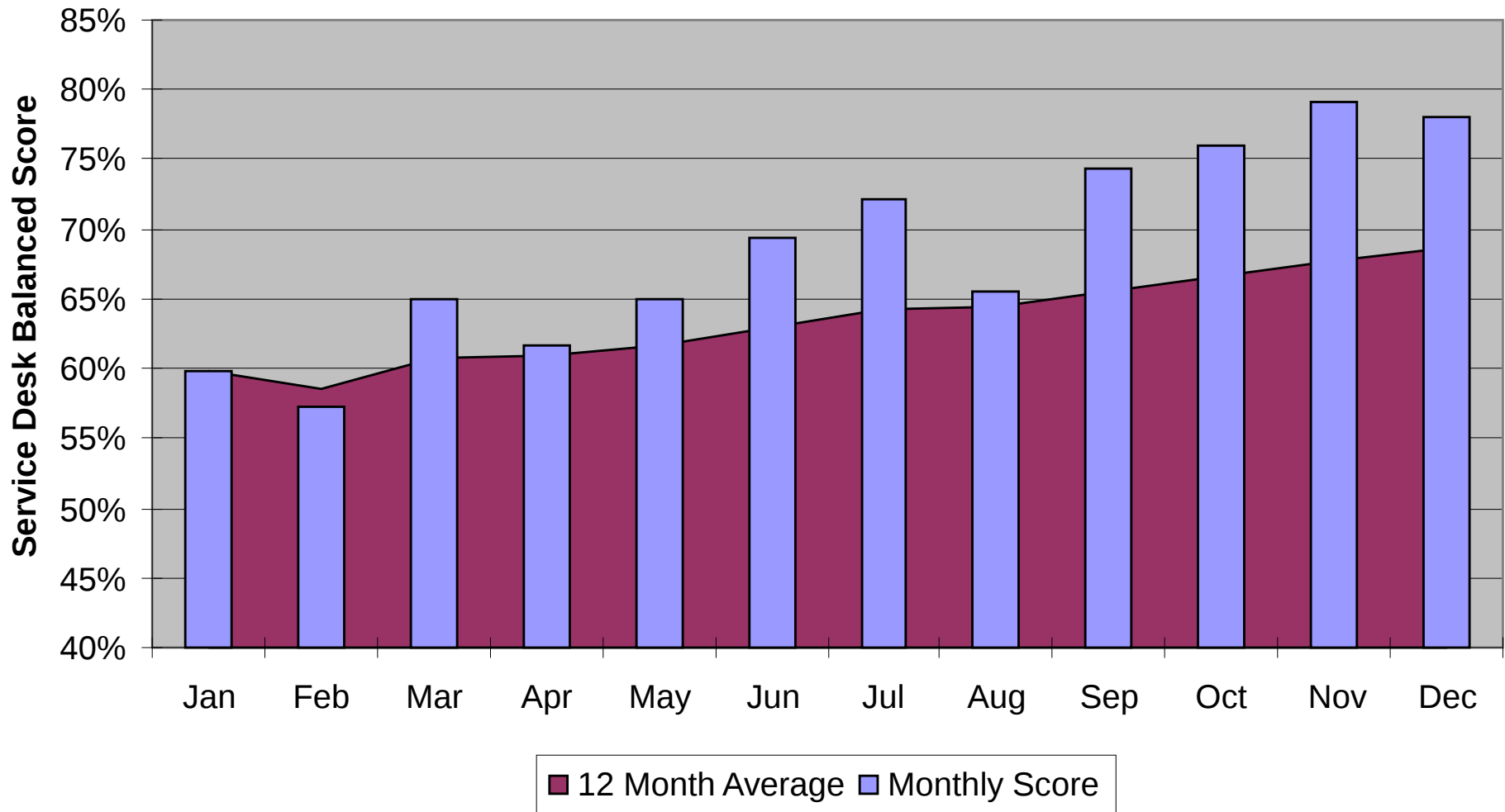
**Step 6**

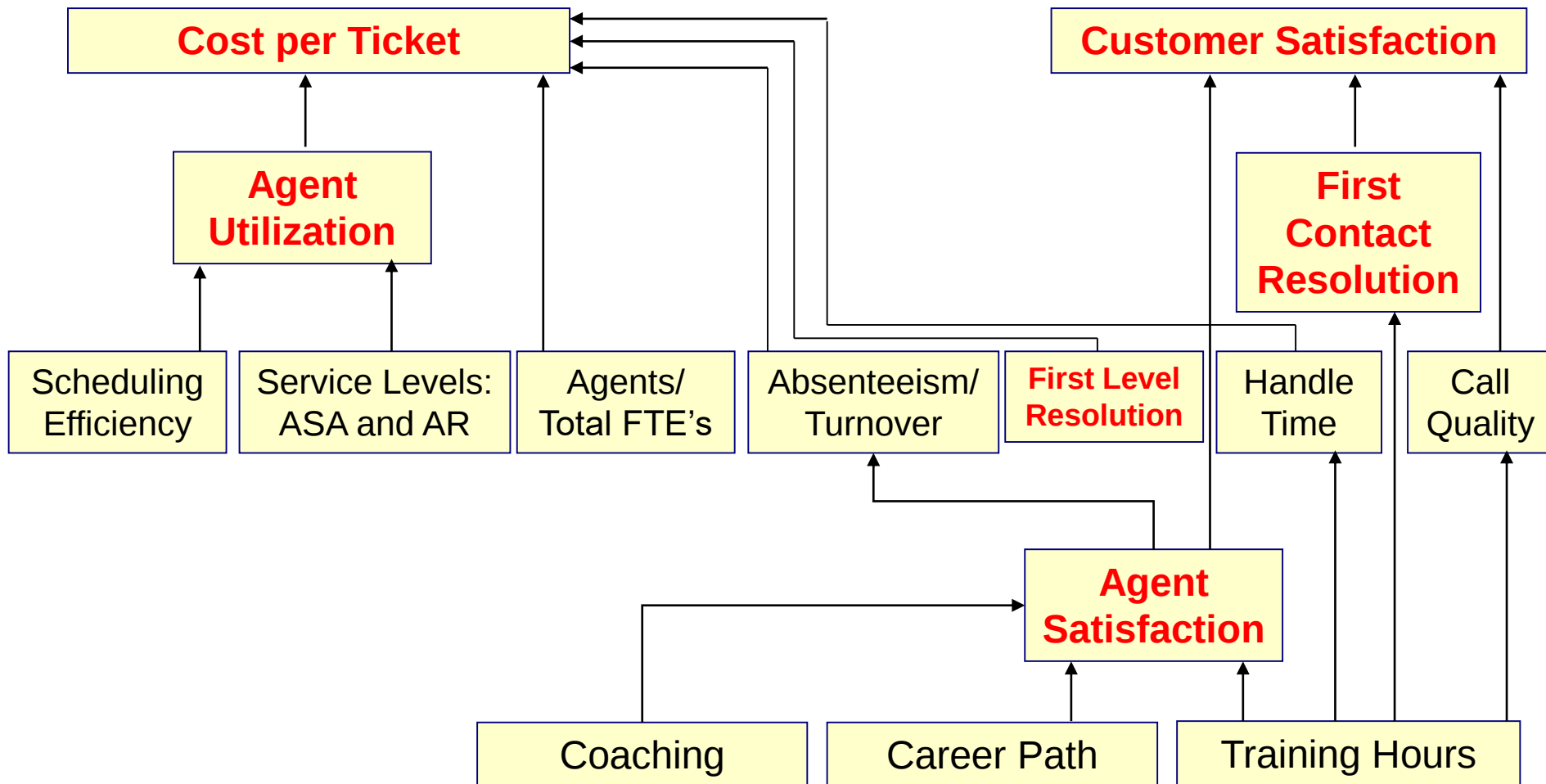
Your balanced score for each metric is calculated: metric score X weighting

# Benchmarking Your Overall Performance



# The Service Desk Performance Trend





# Some Common Desktop Support KPI's

## **Cost**

- Cost per Ticket
- Cost per Incident
- Cost per Service Request

## **Service Level**

- Average Incident Response Time (min)
- % of Incidents Resolved in 24 Hours
- Mean Time to Resolve Incidents (hours)
- Mean Time to Complete Service Requests (days)

## **Ticket Handling**

- Average Incident Work Time (min)
- Average Service Request Work Time (min)
- Average Travel Time per Ticket (min)

## **Quality**

- Customer Satisfaction
- First Contact Resolution Rate (Incidents)
- % Resolved Level 1 Capable
- % of Tickets Re-opened

## **Technician**

- Technician Satisfaction
- New Technician Training Hours
- Annual Technician Training Hours
- Annual Technician Turnover
- Technician Absenteeism
- Technician Tenure (months)
- Technician Schedule Adherence

## **Productivity**

- Technician Utilization
- Tickets per Technician-Month
- Incidents per Technician-Month
- Service Requests per Technician-Month
- Ratio of Technicians to Total Headcount

## **Workload**

- Tickets per Seat per Month
- Incidents per Seat per Month
- Service Requests per Seat per Month
- Incidents as a % of Total Ticket Volume

**And there are hundreds more!!**



# The 80/20 Rule for Desktop Support KPI's

## **Cost**

- Cost per Ticket

## **Quality**

- Customer satisfaction

## **Productivity**

- Technician Utilization

## **Call Handling**

- First contact resolution rate (incidents)

## **Service Level**

- Mean Time to Resolve

## **TCO**

- % Resolved Level 1 Capable

## **Technician**

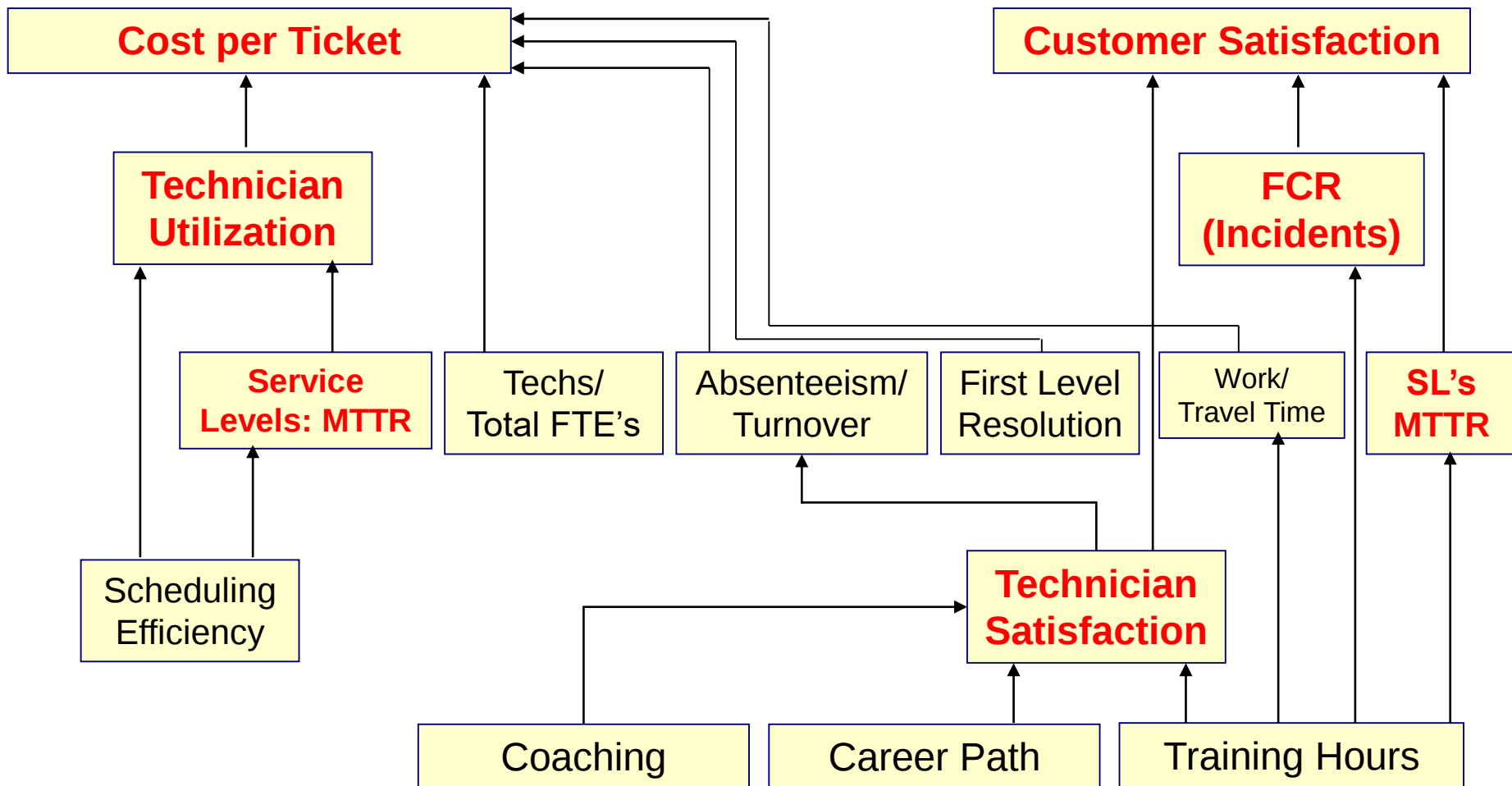
- Technician Satisfaction

## **Aggregate**

- Balanced scorecard



# A Summary of KPI Correlations for Desktop Support



# Think Holistically – End-to-End Support Process

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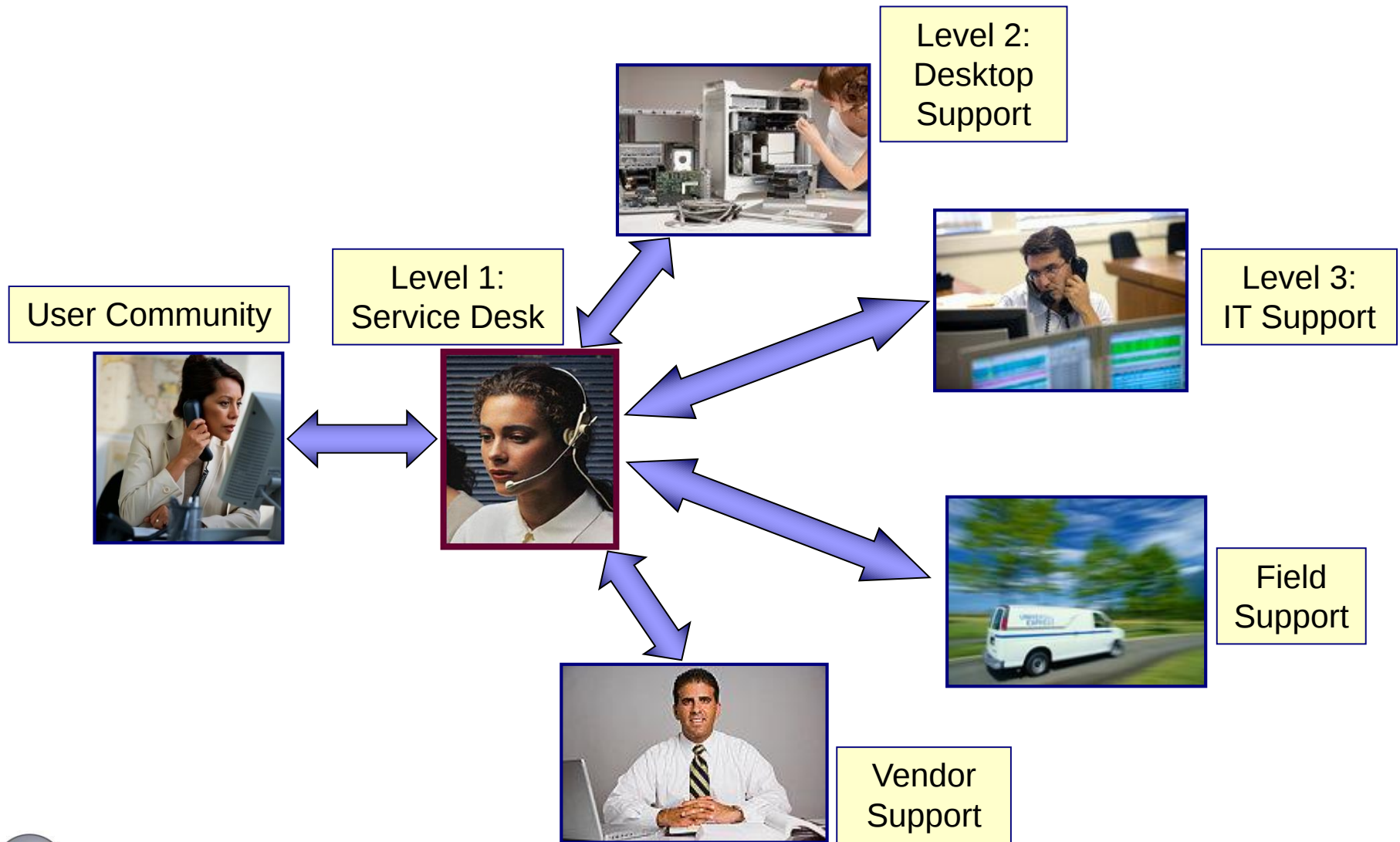


# Support Has an Opportunity to Minimize TCO

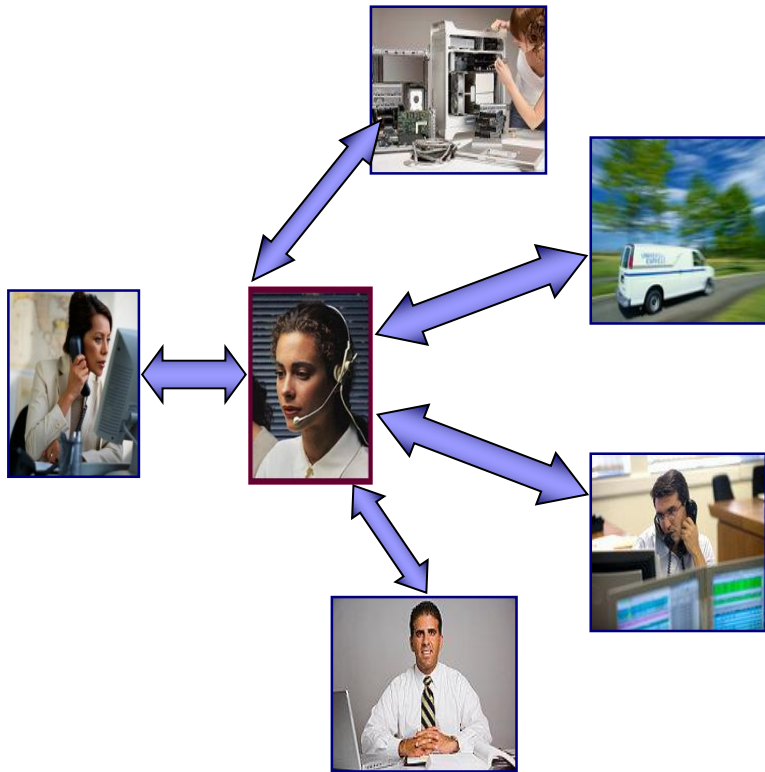
|                                                                                     | Support Level                               | Cost per Ticket |
|-------------------------------------------------------------------------------------|---------------------------------------------|-----------------|
|    | Vendor                                      | \$471           |
|     | Field Support                               | \$196           |
|    | Level 3 IT<br>(apps, networking, NOC, etc.) | \$85            |
|    | Level 2: Desktop Support                    | \$62            |
|  | Level 1: Service Desk                       | \$22            |



# A SPOC Service Desk is Highly Leveraged



# Key SPOC Principles

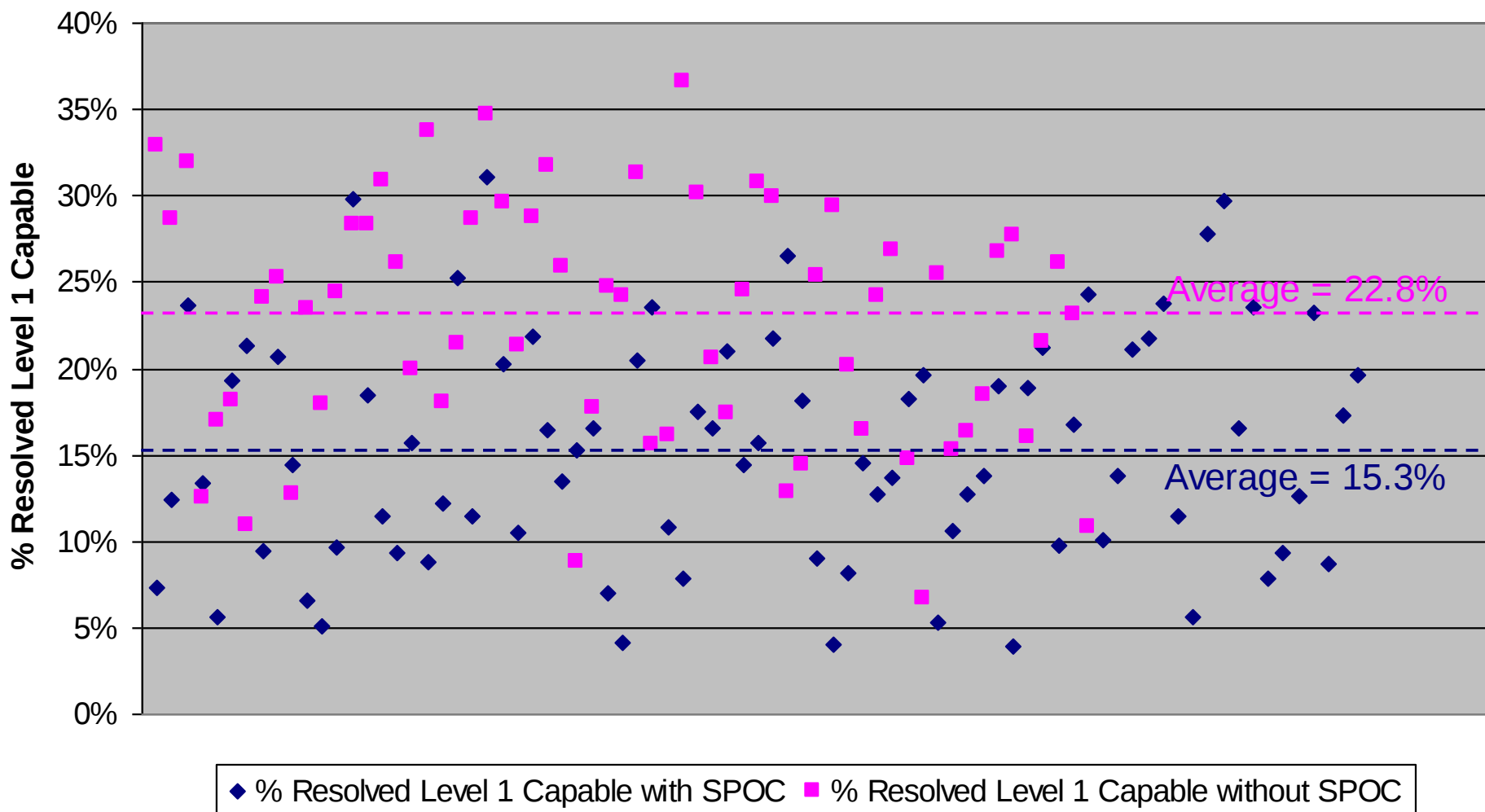


## Key SPOC Principles

- Enterprise takes an end-to-end view of user support
- User/Customer has a single point of contact for all IT-related incidents, questions, problems, and work requests
- The Level 1 Service Desk is the SPOC
- Level 1 is responsible for:
  - Ticket triage
  - Resolution at Level 1 if possible
  - Effective handoffs to n level support
  - Resolution coordination and facilitation
  - Ticket closure
- Desktop “Drive-bys”, “Fly-bys”, and “Snags” are strongly discouraged



# SPOC Support Reduces Total Cost of Ownership



# Define and Set Expectations

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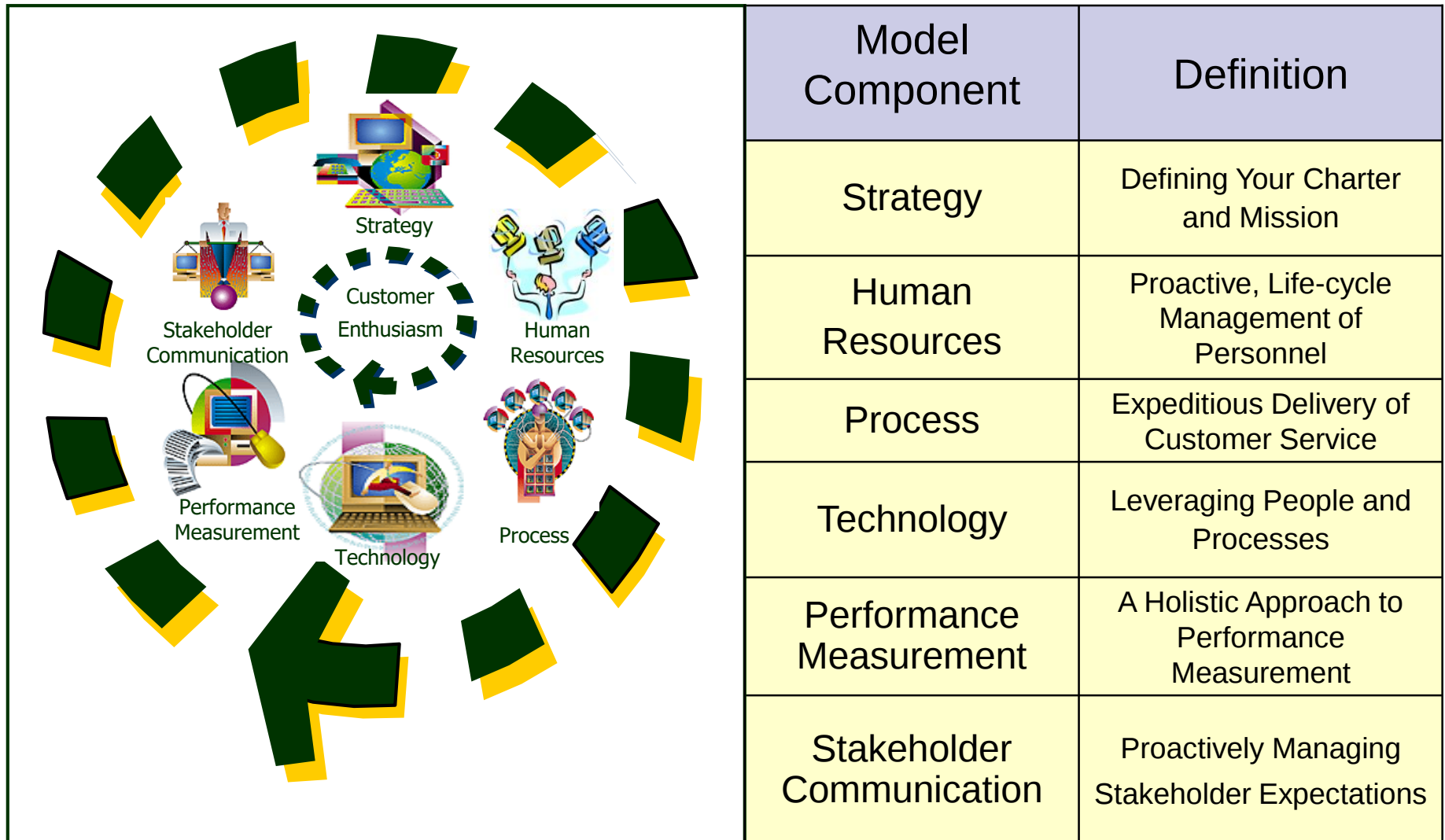
# Establish Performance Targets

| Performance Metric                        | Current Performance | Target Performance |
|-------------------------------------------|---------------------|--------------------|
| Cost per Inbound Contact                  | \$28.12             | <b>\$24.00</b>     |
| Technician Utilization                    | 39.2%               | <b>50.0%</b>       |
| Inbound Contacts per Technician per Month | 391                 | <b>450</b>         |
| First Contact Resolution Rate             | 75.0%               | <b>80.0%</b>       |
| First Level Resolution Rate               | N/A                 | <b>85.0%</b>       |
| Average Speed of Answer (ASA) (seconds)   | 288                 | <b>60</b>          |
| Call Abandonment Rate                     | 16.6%               | <b>6.0%</b>        |
| <b>Balanced Score</b>                     | <b>47.8%</b>        | <b>71.6%</b>       |

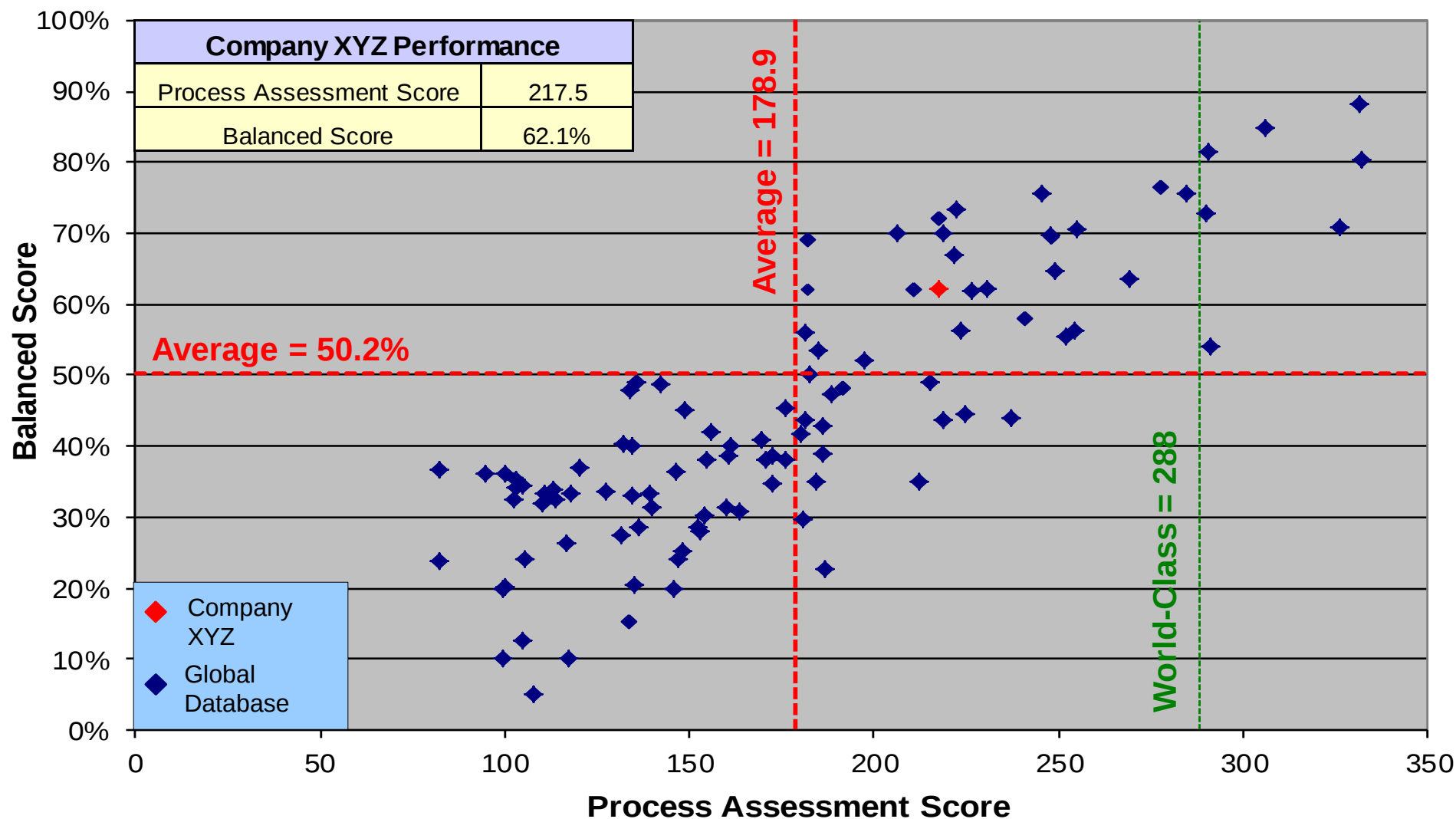
Achieving the performance targets recommended above will increase the Balanced Score from 47.8% to 71.6%, and will elevate your service desk to the top quartile on the Balanced Scorecard.



# Six-Part Model for Service Desk Best Practices



# Process Maturity vs. Scorecard Performance



# Expect Proactivity

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# A Proactive Culture in IT Support

## Some Common Proactive Behaviors

- ☐ Root Cause Analysis / Closed Ticket Analysis
- ☐ Marketing / Brand Management
- ☐ Business Case Analysis for New Investments
- ☐ Benchmarking
- ☐ Goal-based Training
- ☐ Cause-and-Effect Decision-making
- ☐ Contact Deflection into Lower Cost Channels
-  ☐ Agent Scorecards
-  ☐ Manage Agent Morale / Agent Job Satisfaction
-  ☐ Downtime Mitigation



# Driving Individual Accountability: The Technician Scorecard

| Performance Metric                        | Metric Weighting | Performance Range |            | Your Actual Performance | Metric Score | Balanced Score |
|-------------------------------------------|------------------|-------------------|------------|-------------------------|--------------|----------------|
|                                           |                  | Worst Case        | Best Case  |                         |              |                |
| Customer Satisfaction                     | 20.0%            | 67.0%             | 94.0%      | 83.0%                   | 59.3%        | 11.9%          |
| First Contact Resolution Rate (Incidents) | 20.0%            | 38.0%             | 84.0%      | 61.0%                   | 50.0%        | 10.0%          |
| Incidents Closed this Month               | 15.0%            | 19.9              | 76.9       | 59.8                    | 69.9%        | 10.5%          |
| Service Requests Closed This Month        | 15.0%            | 15.6              | 42.2       | 28.5                    | 48.6%        | 7.3%           |
| Unplanned Absenteeism                     | 7.5%             | 0.0%              | 22.0%      | 19.0%                   | 86.4%        | 6.5%           |
| Teamwork                                  | 7.5%             | 0.0               | 5.0        | 3.5                     | 69.9%        | 5.2%           |
| Initiative                                | 7.5%             | 0.0               | 5.0        | 5.0                     | 100.0%       | 7.5%           |
| Mentoring                                 | 7.5%             | 0.0               | 5.0        | 4.5                     | 90.0%        | 6.7%           |
| <b>Total</b>                              | <b>100.0%</b>    | <b>N/A</b>        | <b>N/A</b> | <b>N/A</b>              | <b>N/A</b>   | <b>43.7%</b>   |

## Step 1

Eight critical performance metrics have been selected for the scorecard

## Step 2

Each metric has been weighted according to its relative importance

## Step 3

For each performance metric, the highest and lowest performance levels in the benchmark are recorded

## Step 4

Your actual performance for each metric is recorded in this column

## Step 5

Your score for each metric is then calculated:  $(\text{worst case} - \text{actual performance}) / (\text{worst case} - \text{best case}) \times 100$

## Step 6

Your balanced score for each metric is calculated: metric score X weighting

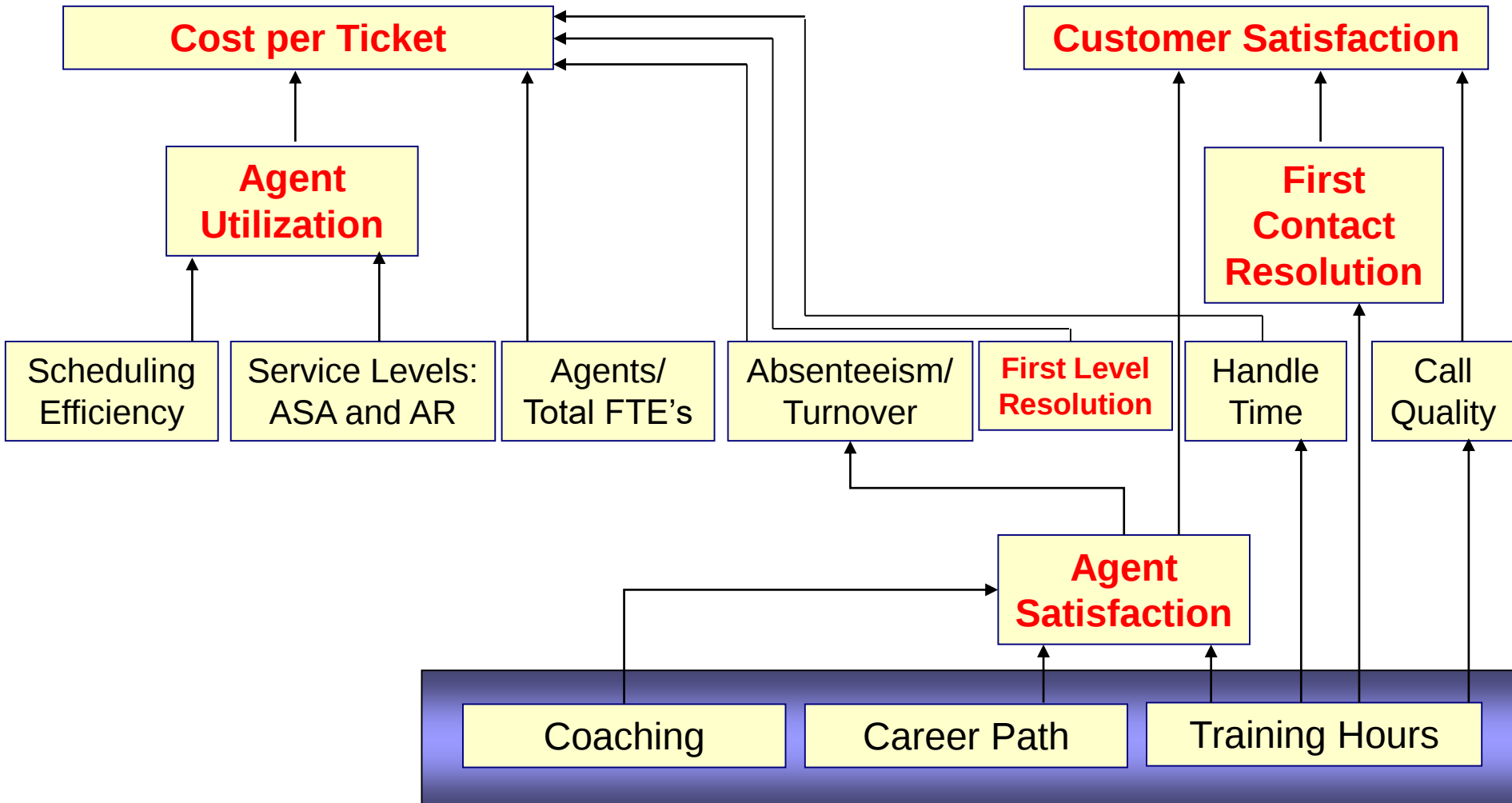


# Monthly Technician Performance Postings

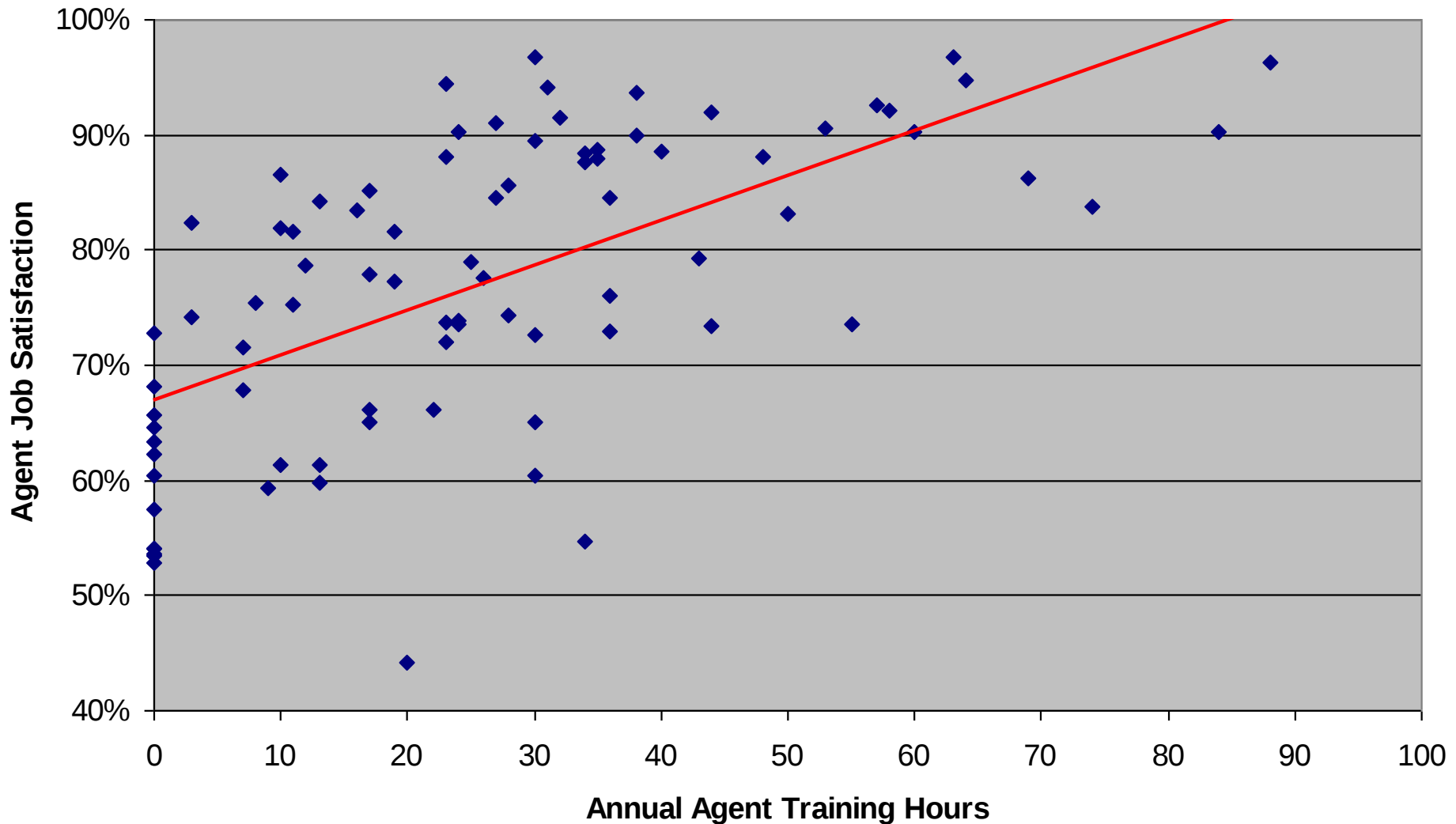
| Technician Number | Monthly Ranking | Monthly Scorecard Performance |       |       |       |       |       | Six Month Average |
|-------------------|-----------------|-------------------------------|-------|-------|-------|-------|-------|-------------------|
|                   |                 | Sep                           | Aug   | Jul   | Jun   | May   | Apr   |                   |
| 11                | 1               | 95.8%                         | 98.0% | 97.1% | 95.7% | 98.3% | 97.3% | 97.0%             |
| 32                | 2               | 92.8%                         | 92.1% | 90.3% | 89.3% | 84.6% | 92.2% | 90.2%             |
| 21                | 3               | 91.5%                         | 88.5% | 83.2% | 94.0% | 93.7% | 93.5% | 90.7%             |
| 35                | 4               | 91.0%                         | 86.8% | 85.2% | 78.5% | 80.5% | 68.2% | 81.7%             |
| 14                | 5               | 89.5%                         | 89.1% | 90.0% | 90.1% | 92.3% | 92.1% | 90.5%             |
| 26                | 6               | 83.8%                         | 84.4% | 90.2% | 86.5% | 77.8% | 63.9% | 81.1%             |
| 25                | 7               | 83.0%                         | 73.6% | 81.9% | 72.1% | 84.8% | 87.9% | 80.5%             |
| 15                | 8               | 70.4%                         | 66.6% | 53.3% | 56.3% | 56.6% | 39.0% | 57.0%             |
| 20                | 9               | 64.9%                         | 66.5% | 70.1% | 56.9% | 40.9% | 72.7% | 62.0%             |
| 31                | 10              | 62.3%                         | 47.4% | 22.7% | 38.4% | 26.0% | 93.0% | 48.3%             |
| 16                | 11              | 61.0%                         | 62.8% | 54.5% | 45.9% | 41.7% | 62.7% | 54.8%             |
| 17                | 12              | 57.9%                         | 42.1% | 32.3% | 71.6% | 60.3% | 60.3% | 54.1%             |
| 33                | 13              | 56.8%                         | 75.5% | 64.8% | 80.3% | 79.7% | 73.5% | 71.8%             |
| 13                | 14              | 52.2%                         | 34.9% | 61.0% | 52.8% | 58.9% | 48.7% | 51.4%             |
| 24                | 15              | 48.9%                         | 66.7% | 86.9% | 87.7% | 83.6% | 74.5% | 74.7%             |
| 28                | 16              | 46.4%                         | 45.5% | 19.3% | 40.3% | 28.8% | 32.4% | 35.4%             |
| 27                | 17              | 43.7%                         | 26.5% | 31.5% | 24.3% | 22.2% | 17.2% | 27.6%             |
| 19                | 18              | 41.5%                         | 28.4% | 50.1% | 48.1% | 71.1% | 81.0% | 53.4%             |
| 23                | 19              | 39.1%                         | 52.3% | 57.1% | 86.4% | 87.7% | 88.9% | 68.6%             |
| 22                | 20              | 36.8%                         | 18.7% | 19.3% | 52.9% | 66.4% | 64.3% | 43.1%             |
| 12                | 21              | 36.6%                         | 43.2% | 33.1% | 65.7% | 69.0% | 86.0% | 55.6%             |
| 30                | 22              | 36.3%                         | 22.6% | 23.5% | 85.8% | 81.5% | 70.3% | 53.3%             |
| 29                | 23              | 34.1%                         | 44.9% | 50.2% | 28.3% | 48.9% | 36.9% | 40.5%             |
| 34                | 24              | 33.4%                         | 37.9% | 23.1% | 21.7% | 29.7% | 22.6% | 28.0%             |
| 18                | 25              | 32.6%                         | 68.4% | 80.4% | 88.4% | 83.8% | 91.6% | 74.2%             |
| Monthly Average   |                 | 59.3%                         | 58.5% | 58.0% | 65.5% | 66.0% | 68.4% | 62.6%             |



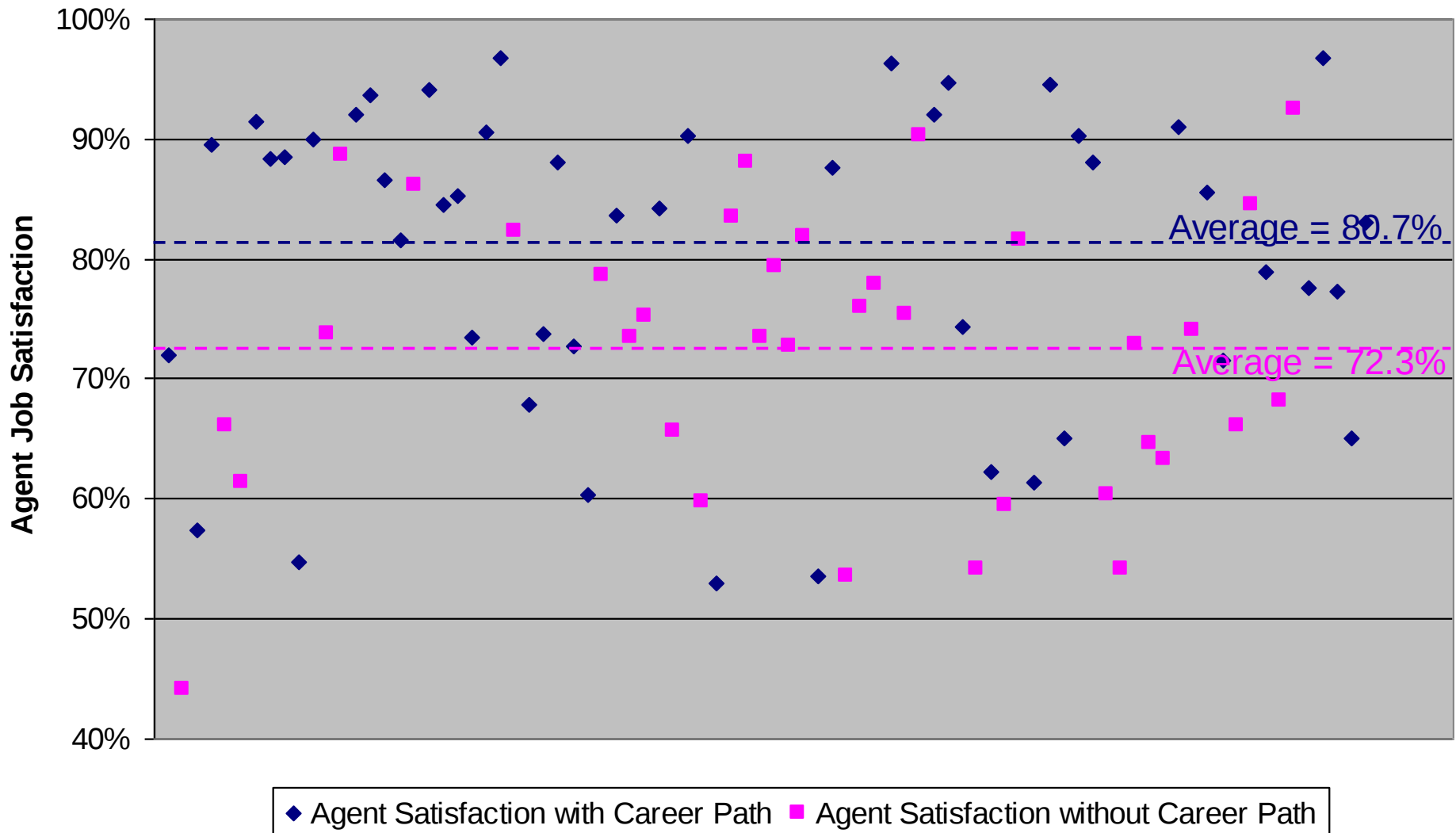
# Managing Agent Morale and Job Satisfaction



# Agent Training Hours vs. Agent Job Satisfaction



# The Impact of Career Path on Agent Job Satisfaction



# Cost of Downtime

## Cost of Downtime

### Productivity Losses

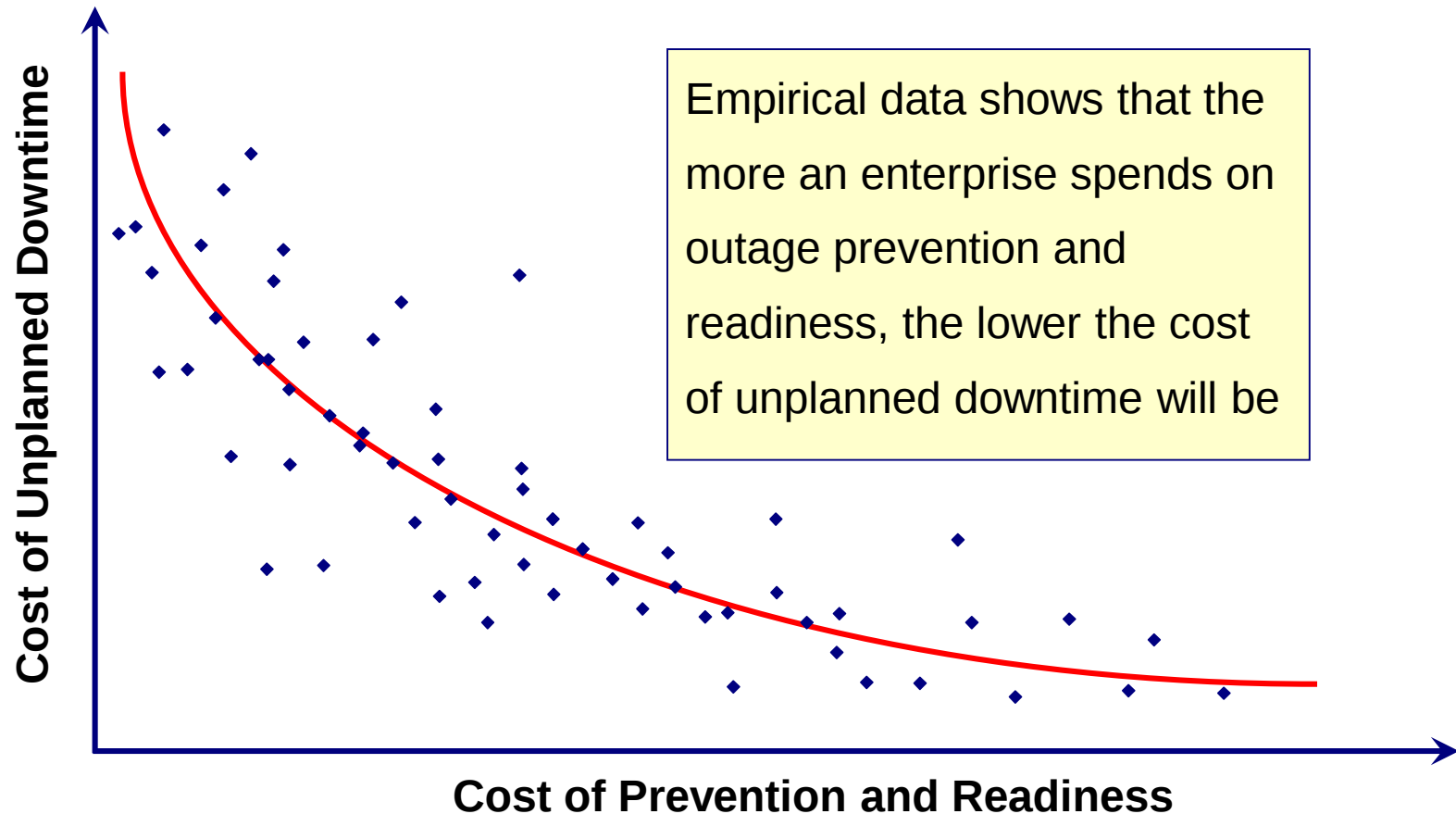
- ❑ Lost productivity from employees who are idled or slowed by the outage

### Business Losses

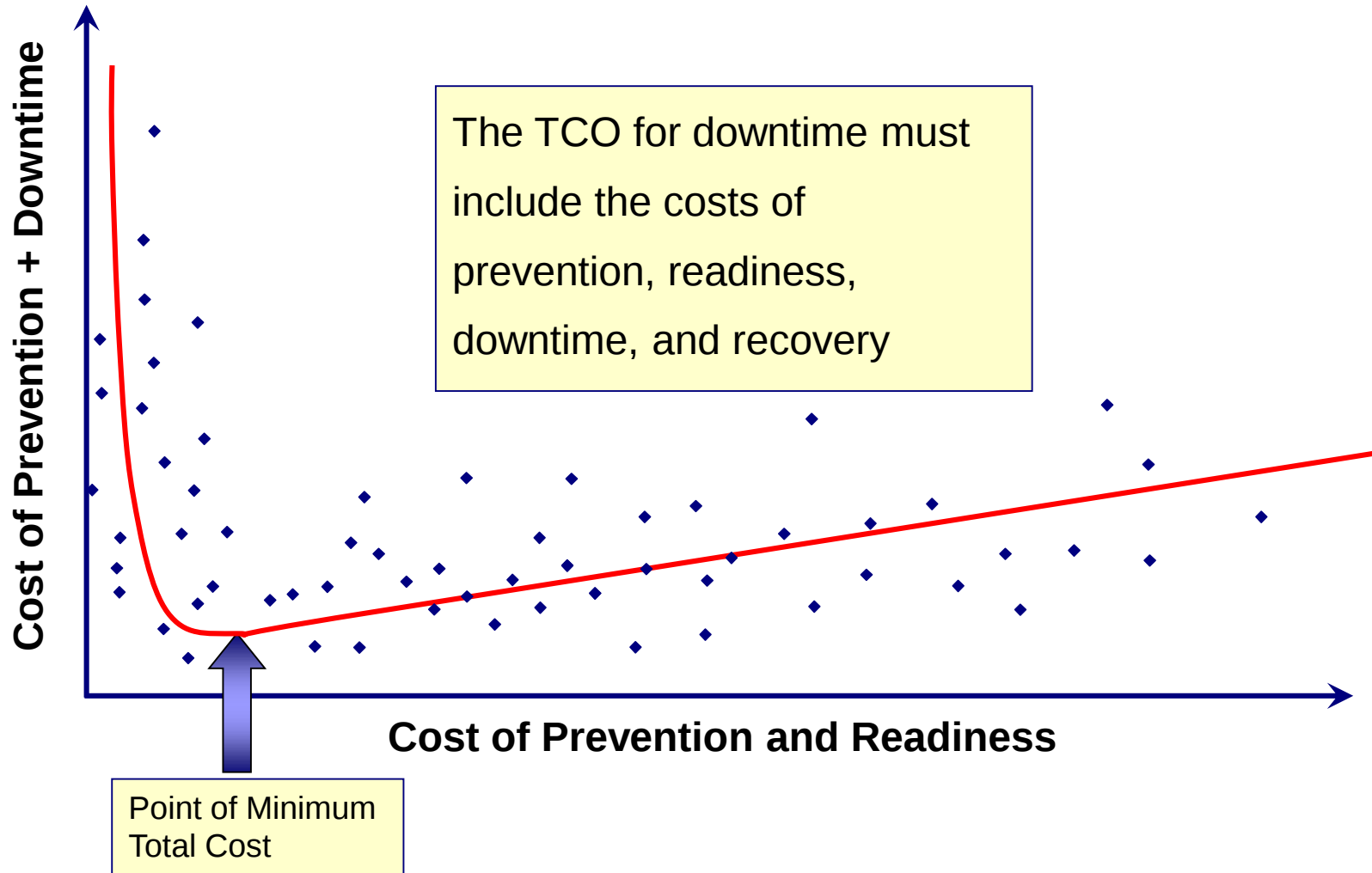
- ❑ Lost sales
- ❑ Lost customers
- ❑ Product spoilage and shrinkage
- ❑ Damage to business reputation



## Cost of Unplanned Downtime



# Total Cost of Downtime



# Downtime Mitigation Strategies for Service and Support

- ❑ Disaster Recovery Drills
- ❑ Outbound user notifications for planned outages
- ❑ Outbound user notifications for major unplanned outages
- ❑ Recorded messages to inform inbound callers that service and support is aware of and working to resolve any major issues



# Manage the Message of Service and Support

1. Think of Service and Support as a Business – And Act Accordingly!
2. Understand the Economic Potential of Service and Support
3. Demand Business Results and Accountability
4. Become Conversant in the KPI's of Service and Support
5. Think Holistically – End-to-End Support Process
6. Define and Set Expectations
7. Expect Strategic Thinking and Proactivity
- ➔ 8. Manage the Message of Service and Support
9. Dedicate Time and Attention to the Function



# Message Management in IT Support

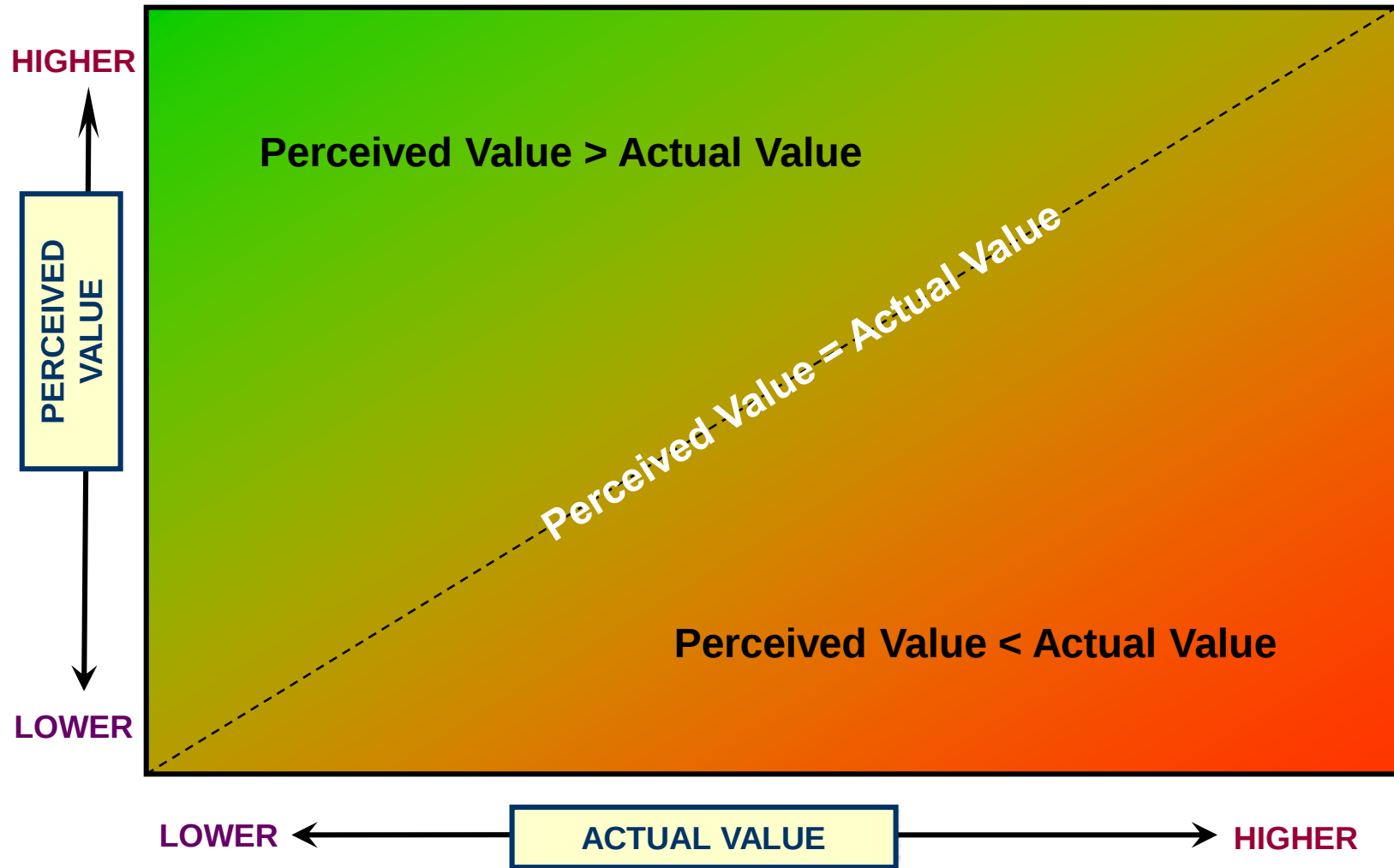
We've all heard the expression...

*“Expectations Not Set...  
are Expectations Not Met!”*

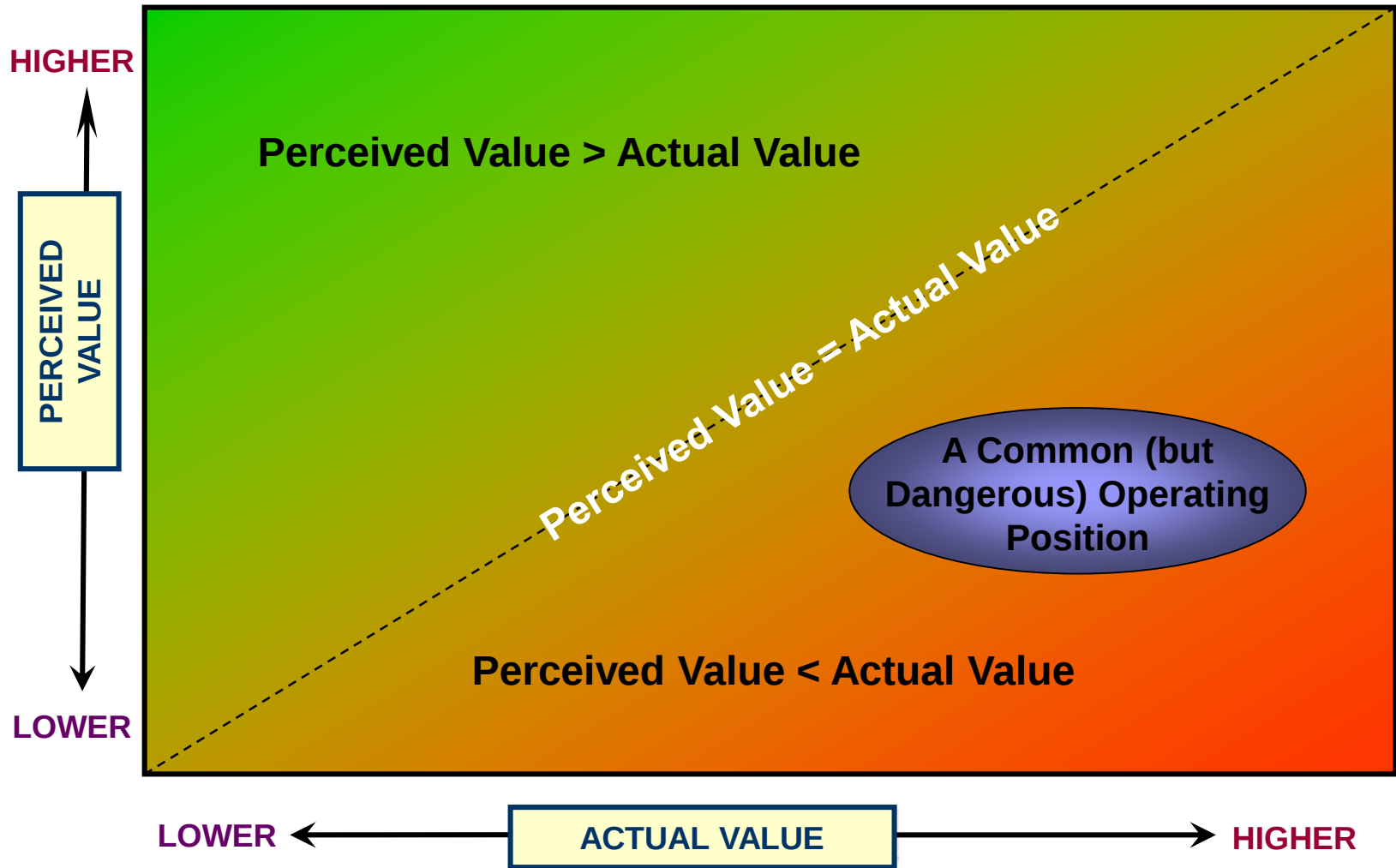
So, let's get serious about proactively managing expectations!



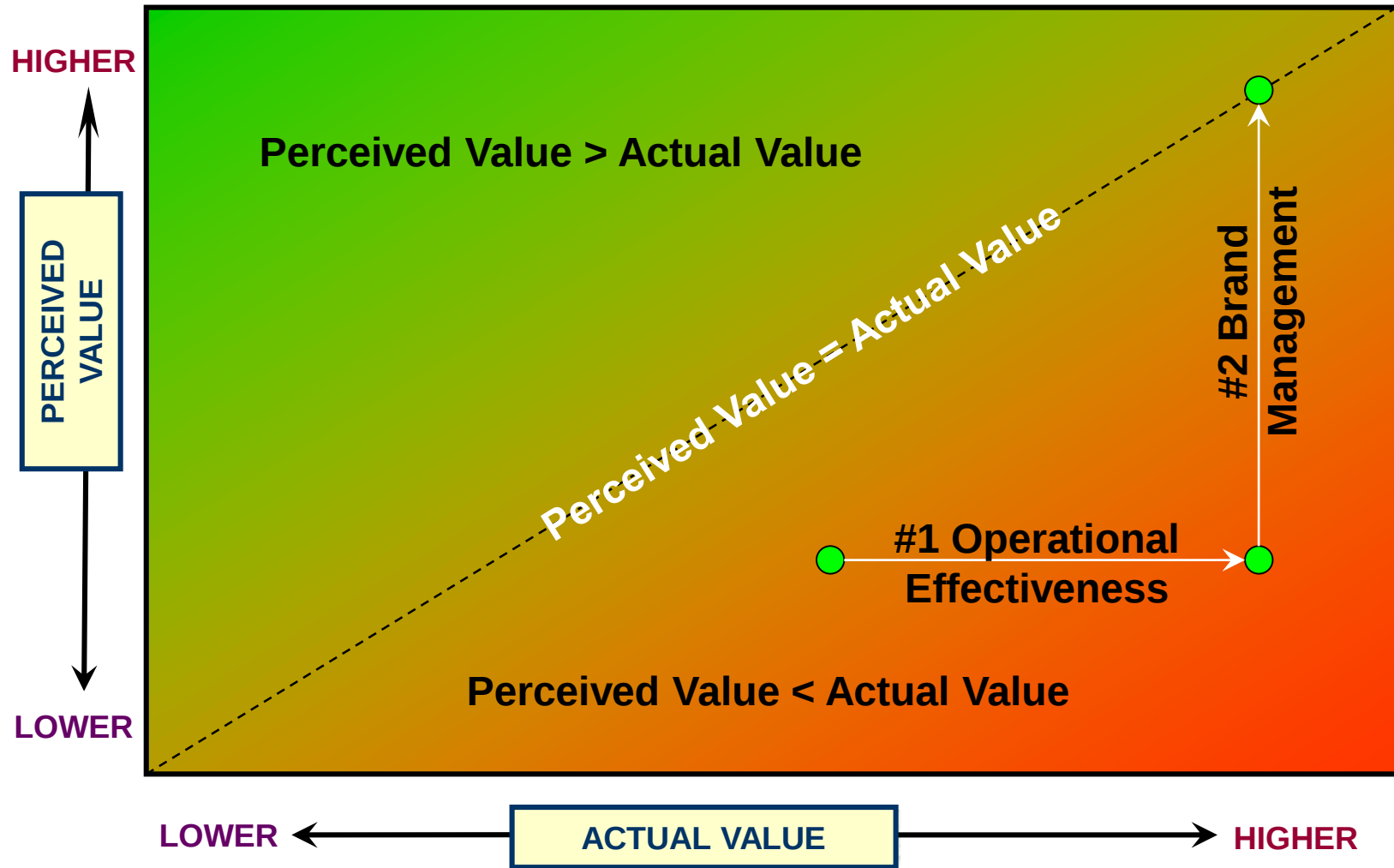
# Perception vs. Reality in IT Support



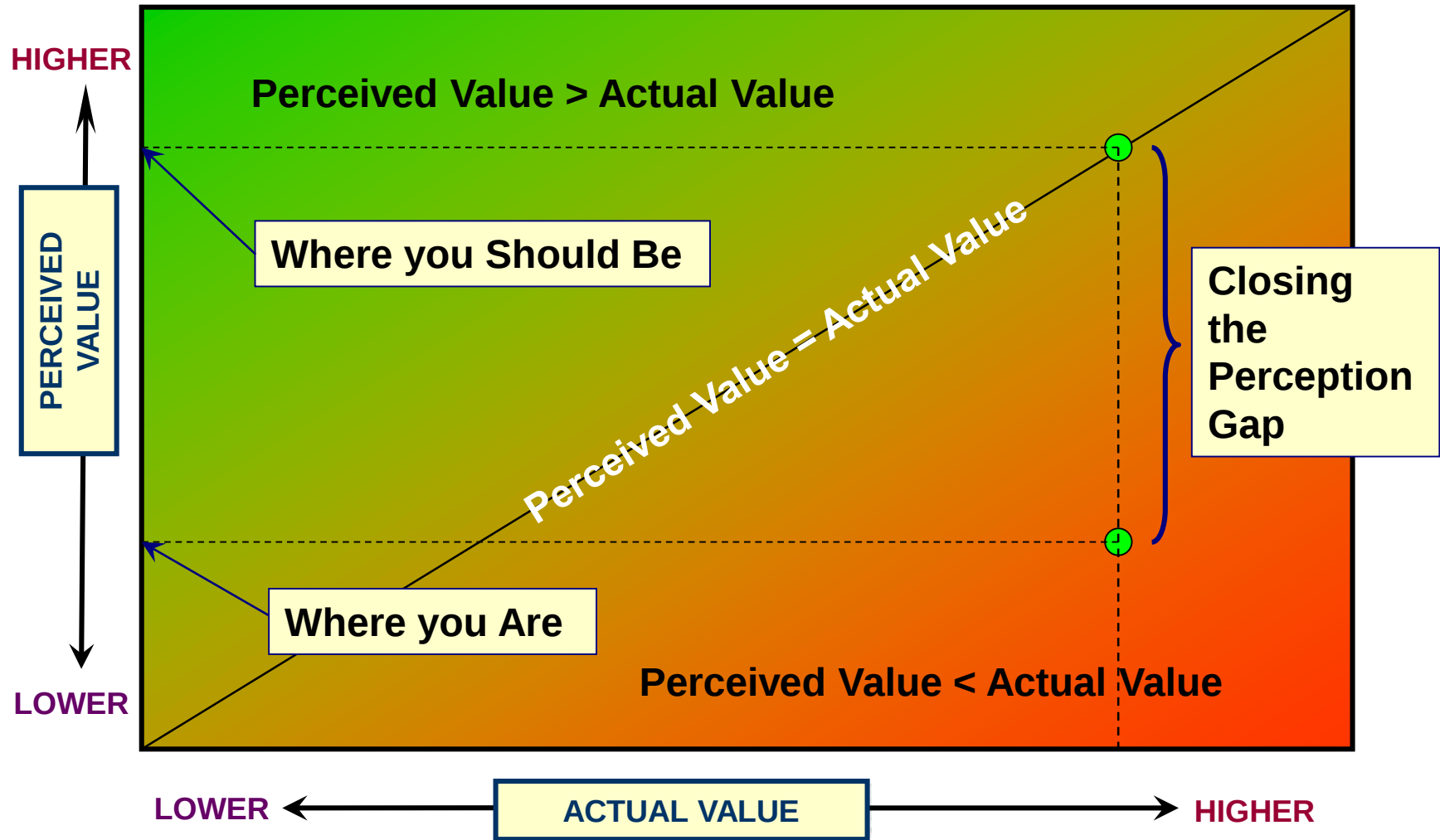
# Perception Is Almost Always Worse Than the Reality



# Brand Management in IT Support



# Closing the Perception Gap



# Brand Management: The Five W's

1. Who – Who are the Key Stakeholder Groups?
2. What – What are the Key Messages?
3. When – When are You Going to Communicate Them?
4. Where/How – Where/How do You Reach the Stakeholders?
5. Why – Why are We Doing This?



# The Most Common Communication Vehicles

## Newsletters



## Brown Bag Sessions



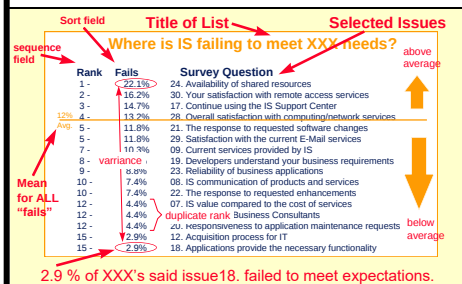
## Leave Behinds



## Business Unit Liaisons



## Surveys



## Log-in Screens



## Webcasts



## FAQ Site



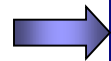
# Messaging Summary

- ❑ Managing the gap between perception and reality is fairly straightforward
  - It doesn't take a lot of time, or cost a lot of money
- ❑ But it is critically important
  - The success of your support organization depends as much on your image, as it does on your actual performance!
- ❑ The Benefits of effective Internal Marketing include:
  - The Opportunity to convey your value proposition!
  - Customer loyalty and positive word-of-mouth referrals
  - Credibility, which leverages your ability to Get Things Done!
  - A Positive Image for IT overall
  - High levels of Customer Satisfaction



# Dedicate Time and Attention to the Function

1. Think of Service and Support as a Business – And Act Accordingly!
2. Understand the Economic Potential of Service and Support
3. Demand Business Results and Accountability
4. Become Conversant in the KPI's of Service and Support
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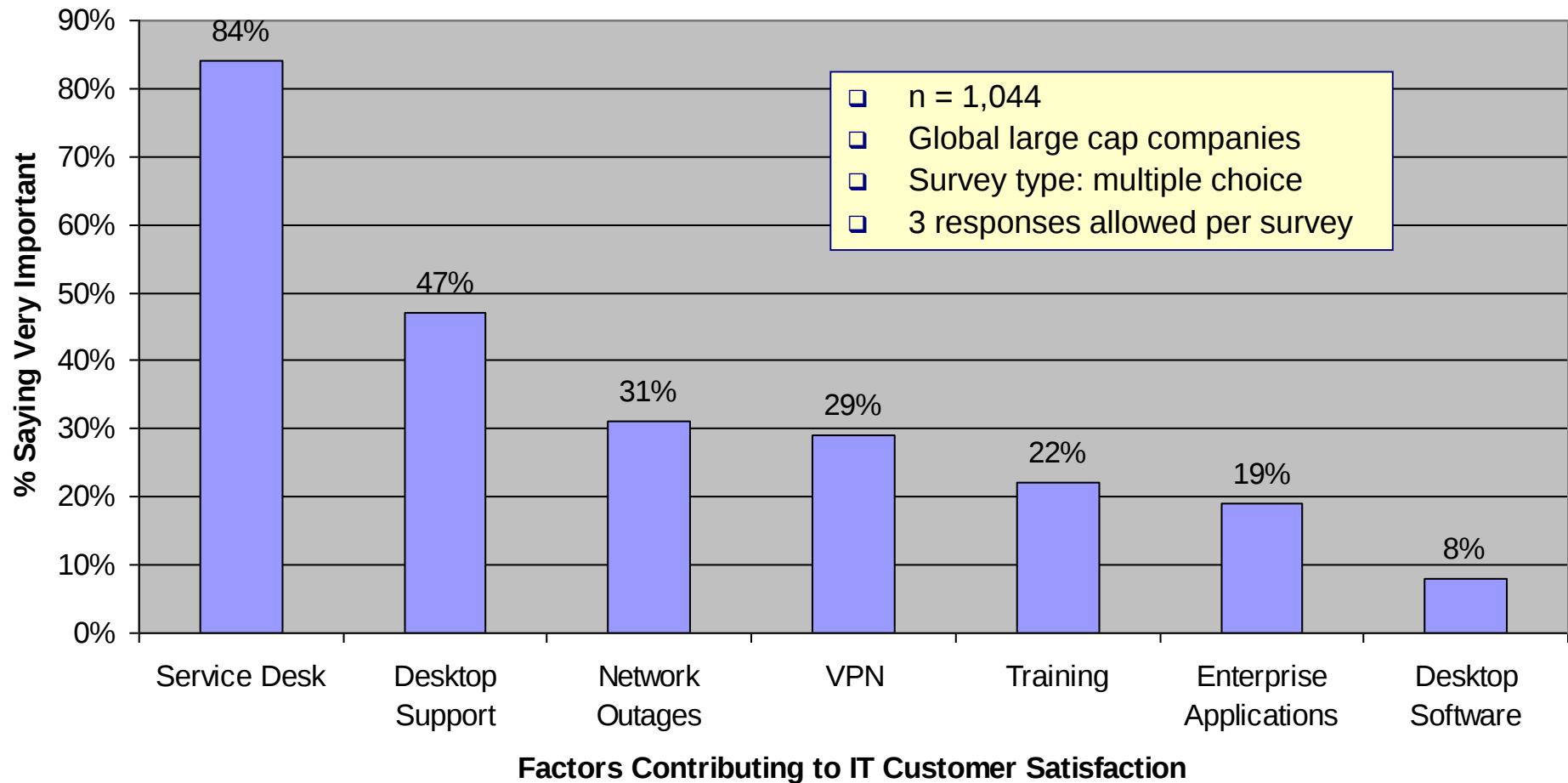
# Exploit the Opportunity!



***"Delight customers?! Why can't we just satisfy them like we used to?"***



# Service Desk Drives Customer Satisfaction for *All of IT*



- 84% cited the service desk as a very important factor in their overall satisfaction with corporate IT
- 47% cited desktop support as a very important factor in their overall satisfaction with corporate IT



# Summary: Principles of Effective Leadership

1. Think of Service and Support as a Business – And Act Accordingly!
2. Understand the Economic Potential of Service and Support
3. Demand Business Results and Accountability
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# Service and Support as a Business





*Questions?*



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*Thank You!*



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# About MetricNet

*Your Benchmarking Partner*



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MetricNet™  
Performance Benchmarking

## Your Speaker: Jeff Rumburg



- Co Founder and Managing Partner, MetricNet, LLC
- Winner of the 2014 Ron Muns Lifetime Achievement Award
- Former CEO, The Verity Group
- Former Vice President, Gartner
- Founder of the Service Desk Benchmarking Consortium
- Author of *A Hands-On Guide to Competitive Benchmarking*
- Harvard MBA, Stanford MS



# Benchmarking is MetricNet's Core Business

## Information Technology

- Service Desk
- Desktop Support
- Field Support

## Call Centers

- Customer Service
- Technical Support
- Telemarketing/Telesales
- Collections

## Telecom

- Price Benchmarking

## Satisfaction

- Customer Satisfaction
- Employee Satisfaction



# 27 Years of IT Service and Support Benchmarking Data



Global Database

More than 3,700 IT Service and Support Benchmarks

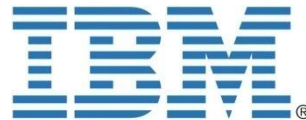
70+ Key Performance Indicators

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*Thank You!*



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