



SESSION 108

Monday, November 2, 10:15am - 11:15am

Track: Service Support and Operations

Constructing the UFFA Clan: A Case Study

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Session Description

This informative session will provide attendees with an insider view into the past, present, and future state of the core teams that ensure continuous functionality of First American Titles worldwide operations. Attendees will learn about a round-the-clock, follow-the-sun support program that leverages today's best-of-breed technologies, processes, and people to maximize resources with optimal return. (*Experience Level: Intermediate*)

Speaker Background

Brandon Caudle is a seasoned service and support industry practitioner and consultant with more than twenty years of experience working in and with Fortune 500 companies. In past roles, he drove ITIL and knowledge initiatives across multiple companies and countries. Today, Brandon uses his expertise, skillset, and experience to assess, implement, and evolve solutions throughout the technical service and support industry.

Brad Biagi is a highly accomplished and enthusiastic management professional with a strong technical background and customer focus. His relentless passion for innovative training management, project implementation, process improvement, and customer value provides measurable ROI to organizations spanning industries and time zones. In his current role, Brad proactively assesses situations and provides expert support for new and unknown issues, while creating outside-the-box approaches to solving problems and developing new projects.



KCS – Constructing the U.F.F.A. Clan: A Case Study

Brad R Biagi &
Brandon Caudle

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Agenda

- Definitions
- Service Desk - Background and History
- The Problem - Why KCS at First American?
- KCS Birth and First Steps, Stumbling and Falling
- KCS Reborn - Rapid Improvements
- Plateau and Conflict
- Looking Forward, Curve of the Earth
- Questions and Discussion

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ROAR INTO THE MODERN AGE OF SERVICE MANAGEMENT

Unboxing (Definitions)

- KCS = Knowledge Centered Support
- U.F.F.A = Use It, Flag It, Fix It, Author It
- CSI = Consortium for Service Innovation
- KB = Knowledge Base
- KBU = Knowledge base Usage
- ETR = Estimated Time to Resolve
- FASD = First American Service Desk
- TASD = Title Applications Service Desk
- OC = Orange County, home of Disneyland, Reality Shows and First American



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First American OC Based, Worldwide Work



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Service Desk One Team across the Globe



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Background Metrics

Analysts

• 30

Calls per Year

• 165K

Self Ticketing per Year

• 90K

(Ext) Emails per Year

• 7,000

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Pre-KCS (1835 – 2013)

- Dis-tributed Organized Support
- Tribal Knowledge
- One Question = Many Solutions
- Knowledge is Power
- Knowledge = Job Security

JOB SECURITY

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Why KCS at First American?

Problem(s)

Growth

- Company expands onboarding new offices & customers

Volume

- Calls Increase
- Self Ticketing Increases
- Emails increase
- Complexity Increases

Staffing

- Headcount remains the same.
- Expectation is to do more with the same or less

Solution

Shift Left

- Self Service

Standardize Solutions

- Same Answer Every time
- Customer Confidence in Service Desk

Virtualize

- Consolidate many distributed teams

Comparison

- Comparable struggles with ITIL

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KCS is Born - 2013

- Director of Customer Services Hired
- Managers and Trainer attend KCS Principles and Certify
- Style Guide for Authoring created
- Coaches Selected
- Funding Requested for Comprehensive Training



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KCS First Steps



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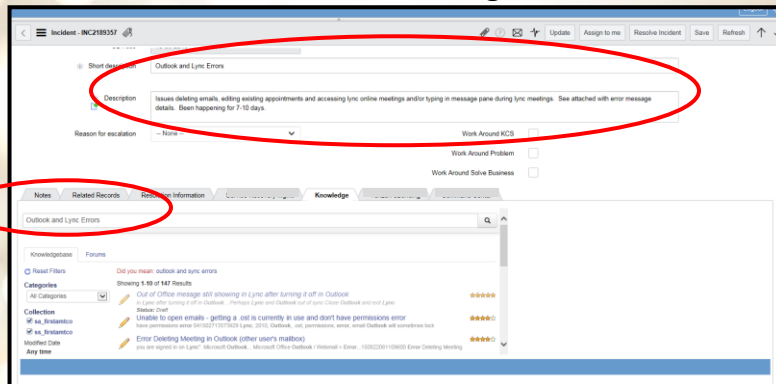


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Tools

- Process Over Tool
- Cloud based ITSM and Knowledge Tools



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2014 – Where We've Been

- KCS Launch at All Hands Meeting
- Internal KCS Training for all Service Desks / Desktop
- Knowledge Base Usage Tracking Begins
- Coaching begins for Authoring articles



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KB Articles

Laptop is not connecting to wireless - Google Chrome

Laptop is not connecting to wireless

Subscribe

Customer Description
Not getting a wireless signal on laptop

Environment
Laptop

Cause
Wireless ON/OFF button was turned off on laptop.

Resolution
Enable the Wireless antenna

- ▶ Push the wireless ON/OFF button on the laptop. When it is turned off, the LED will be orange, red, or off. When it is enabled, it will be blue, green, or white, depending on the laptop model.
- ▶ The button is usually above the keyboard in the upper right corner on the laptop.

Ensure Wireless Connection is enabled

- ▶ click Start click control panel
- ▶ click network and sharing
- ▶ click change adapter settings
- ▶ locate the wireless connection
 - ▶ If it shows disabled...right click the connection, select 'enable the wireless connection'.
 - ▶ Customer should be able to connect to the wireless network

Est. Time to Resolution
5 mins

Escalation Owner

Did this help?
Yes No
1 voted yes
18 views

Actions

- Add to KB
- ✎ Edit this Solution
- 💬 Comment On Solution
- ✉ Email Solution
- 🖨 Print
- ✖ Close

Solution Properties

Solution ID
041402020412878

Last Modified Date
9/17/2014 10:23 AM

Refresh Date:
1/20/2015

Status
Published

Taxonomy

Author
jslollar

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KCS Roles

KCS Quick Reference Guide

*NOTE – If you have any issues viewing the links above – use another browser like *Chrome* or access them all in the “KCS Training” folder within the [ITSM SharePoint](#) site and as KB Documents located within the Knowledge Base

WHO	WHAT	HOW	WHEN
KCS1	Review the “ Solution Manager Alerts Notifications ” – REVISE any FLAGGED solutions that you’ve authored (these are labeled as “ Solutions with Notes ” in the email notification)	“ Solution Manager Alerts Notifications ” are sent to your Outlook profile – REVISE your invalid solutions	Daily
	While working on Service First Incidents – capture the customer’s context into the Incident Record	Use the Service First Incident Template	Every Incident
	While working on Service First Incidents – apply the KB Style Guide and: <ol style="list-style-type: none"> 1. Search for and re-USE existing KB solutions and attach to every incident 2. FLAG any solutions that you find are invalid & include comments as to why 3. REVISE/FIX existing solutions for incidents you’ve successfully resolved 4. ADD new solutions if none exist (to be reviewed or finished by a KCS2/Coach) <ol style="list-style-type: none"> A. Search for Duplicates first 	<ol style="list-style-type: none"> 1. See “How to USE” knowledge” 2. See “How to FLAG” knowledge” 3. See “How to REVISE” knowledge” 4. See “How to ADD” knowledge” <ol style="list-style-type: none"> A. See “How to search for Duplicates” 	Every Incident
	Complete & move your DRAFT KB solutions to the REVIEW status to be PUBLISHED	Open the “ Solution Manager ”...evaluate all the solutions you have in a DRAFT state using the “ KB Style Guide ”, ensure that the solutions adhere to the content standard and then move them to a REVIEW status	Within ten business days
WHO	WHAT	HOW	WHEN
KCS2	Review the “ Solution Manager Alerts Notifications ”: <ul style="list-style-type: none"> • FIX any flagged solutions and PUBLISH them (these are labeled as “Solutions with Notes” in the email notification) and remove FLAG • REFRESH any expired solutions (validate and either extend expiration another year or FLAG it with comments for deletion • Validate & PUBLISH any solutions ready for REVIEW 	“ Solution Manager Alerts Notifications ” are sent to your Outlook profile – see “How to FIX knowledge” <ul style="list-style-type: none"> • See “How to FIX” knowledge & “How to clear a FLAG” and/or comments • REFRESH & PUBLISH using the “KB Style Guide” ensuring that the solutions are valid and adhere to the content standard 	Daily
	While working on Service First Incidents – capture the customer’s context into the Incident Record	Use the Service First Incident Template	Every Incident
	While working on Service First Incidents – apply the KB Style Guide and: <ol style="list-style-type: none"> 1. Search for and re-USE existing KB solutions and attach to every incident 2. FLAG any solutions that you find are invalid & include comments as to why 3. FIX or FINISH any KB solutions that are framed by you or others 4. ADD new solutions if none exist & PUBLISH them when completed <ol style="list-style-type: none"> A. Search for Duplicates first 	<ol style="list-style-type: none"> 1. See “How to USE” knowledge” 2. See “How to FLAG” knowledge” 3. See “How to FIX” knowledge” 4. See “How to ADD” knowledge” <ol style="list-style-type: none"> A. See “How to search for Duplicates” Apply the KB Style Guide to ensure PUBLISHED solutions adhere to the content standard	Every Incident, Daily
	Complete & Move your own DRAFT KB Articles to the PUBLISHED status	Open the “ Solution Manager ”...evaluate all the solutions you have in a DRAFT state using the “ KB Style Guide ”, ensure that the solutions adhere to the content standard and then move them to a PUBLISHED status	Within ten business days

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Plateau and Conflict



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2014 Issues

- No one's Day Job
- Only Basic Metrics
- Usage After the Fact
- Low Confidence
- What's In It For Me (WIIFM)?



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KCS Reborn



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2015 – What We're Doing

- Knowledge Usage Gamification
- KB scoring of 70 1st and 2nd Level Analysts / Techs / Engineers
- Article Sampling & Scoring
- Prob Management Top 100
- Using Knowledge to reduce mean time to resolution (keep it or send it)
- ETR for every article
- Flag or Fix – Heavy Usage
- Flag if ETR is wrong / blank
- Extend KCS to Level 3*

*Only within department



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Gamification Challenge

- What to score?
- How to score?
- Incent vs Performance

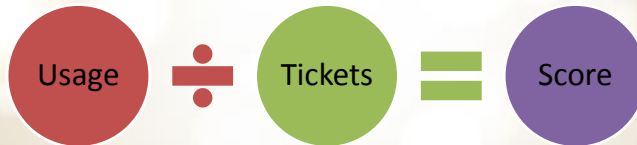


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Knowledge Base Usage (KBU) 2014

- Measure the percentage of articles attached to tickets



Note: Scoring was based only on KB Attachment to Ticket ratio

KB Scoring

- Scoring of 70 1st and 2nd Level Analysts

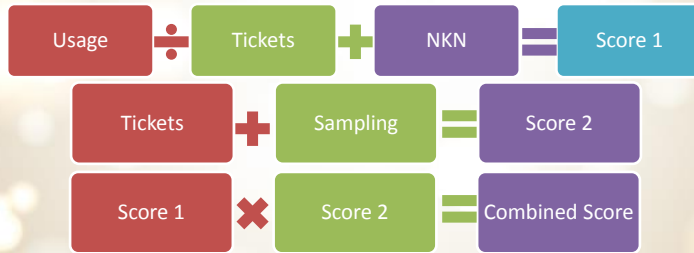
Analyst	Incidents	Attached	Blank	Attached for score	Score 1	Yes	No	OK	Scored	Good	Score 2	Score 1*2
Mickey	21	19	2	20	95.2%	5	1	1	7	6	85.7%	81.6%
Donald	3	2	1	3	100.0%	2	0	1	3	3	100.0%	100.0%
Goofy	34	34	0	34	100.0%	5	0	0	5	5	100.0%	100.0%
Daisy	38	31	7	38	100.0%	5	0	7	12	12	100.0%	100.0%
Minnie	47	35	12	47	100.0%	5	0	12	17	17	100.0%	100.0%
Pluto	18	16	2	17	94.4%	5	1	1	7	6	85.7%	81.0%
Pete	2	1	1	2	100.0%	1	0	1	2	2	100.0%	100.0%

- Incident Sampling & Scoring

Number	Short description	Assigned to	Resolution number	Accurate Resolution
INC2110926	Login issue with Ibanking-VIP security code invalid for	Mickey	04142471604133	Y
INC2308074	FAST Agent - FAST Admin issues	Mickey	150915185156074	Y
INC2115667	myFirstam - property search issue, cannot see services	Donald		Y
INC2061485	Add work Q - 9/7 (NNN)	Donald		ok
INC2099972	FAST - Frozen on Scan	Donald	041228316490885	Y
INC2110812	FAST Upload Issues	Donald	041402310261056	N
INC2115032	Outlook OST Error	Donald	041405217291074	Y
INC2095213	FAST - Scanning	Donald	041414213215752	Y
INC2110786	FAST - Printer Alignment	Donald	041414216324122	Y

KBU 2015

- Score 1 = Percentage of articles attached to tickets
- Score 2 = Random sample for Quality
- Combined Score = Score 1 x Score 2



Note: Individual Scores are adjusted if the issue was resolved by the customer or the issue went away (NKN – No Knowledge Needed)

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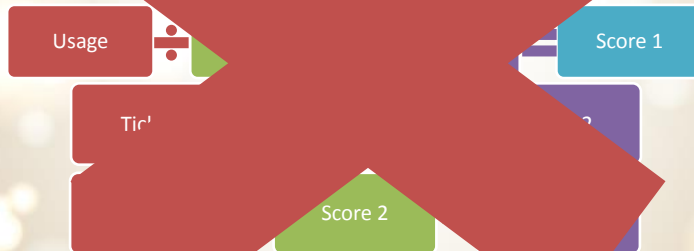
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KBU 2015

- Score 1 = Percentage of articles attached to tickets
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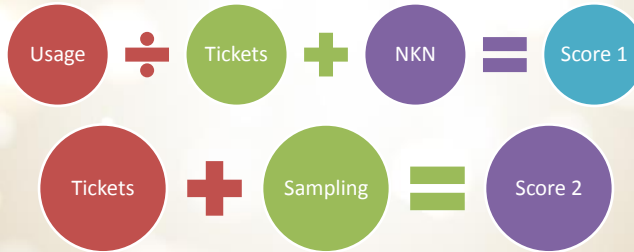
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KBU 2016

- Score 1 = Percentage of articles attached to tickets
- Score 2 = Random sample for Quality



Note: Individual Scores are adjusted if the issue was resolved by the customer or the issue went away (NKN – No Knowledge Needed)

Problem Management Top 100

- Top 100 KB Articles
- Monthly Trending
- Problem Tickets created from major issues



Resolution number	KB Article	January	February	March	April	May	June	July	Grand Total	Owner
41422510545297	SOP-SDS-Onion Generated Alerts / Utilization on Interface	317	448	422	427	392	681	412	3099	Bill
41500907420206	Active Directory (AD) - Repeated Password Lockouts	7	103	73	75	86	105	80	529	
41430414153049	Outlook Pop-up - Asking for Password	34	37	47	53	53	92	64	380	Dale
150311143321982	How To: Printer Setup on a PC - Network Connected Printer Using Direct TCP/IP Printing only (Not a Print Server)			47	52	75	84	54	312	
41421612123370	Clear cookies cache and temp internet files Internet Explorer 10	8	1	29	60	73	65	46	262	
41400910102706	Outlook is slow or unable to launch	28	26	24	51	74	41	30	274	Dale
41304515520886	Hardware Replacement Procedure	22	36	38	30	39	34	23	222	Bob
41424519004914	How to identify what models are supported to what extent - Desktop Hardware Usage and Retirement Guidelines	25	40	65	22	16	9	18	197	Joe

Keep It or Send It?

Training Exercises

Should

I

**Keep It?
Or
Send It?**

Rules for This Exercise

Caller/Customer tells the issue.
Agent has 90 seconds to get to the real issue.

Team discussion:
What other questions could have been asked?
Which KB solution could be used?

Training Exercise 1

Issue:

"My scanner is not working properly."

Caller/Customer:
Customer name: Jim Bean
Username: Jbean
Phone: 267.345.1678
Location: Lubbock, TX

Training Exercise 1

Issue:

"My scanner is not working properly."

Solution ID: 041502223080817
How To: Install / Re-install Kodak i2600 Software
and Drivers

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2015 End of Year Challenges

- What's in it for Me?
- Increased Team Morale
- Incent vs. Performance
- I already know how
- Back stabbing (no flag / fix)



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Looking Forward



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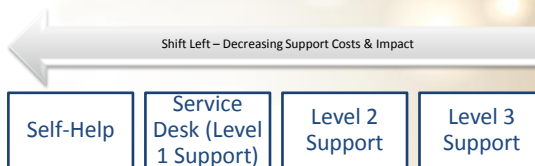


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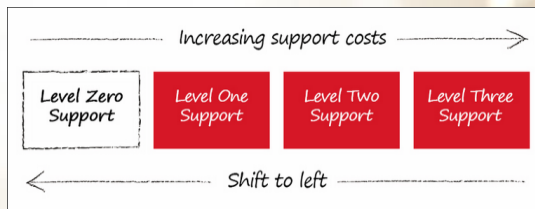


2016 - Where We're Going

- Shift Left
 - Password reset Automation
 - Increased Self Service
 - More Auto-routing



- Flag & Fix Gamification
 - Reporting
 - Examining
 - Sampling
 - Coaching



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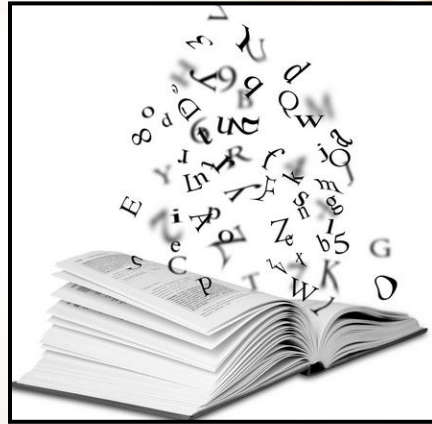


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Lessons Learned

- Change is Inevitable
- Tools May Not Work
- Need Dedicated Staff
- Need Dedicated Time
- Repetition
- Limited by Development Ability



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Current Wins

- Problem Management from KCS
- C-Level Awareness
- Call Elimination
- KCS and ITIL Sync
- Standardization

High Priority Incidents - P3

Number	Created	Priority	Global State	Short description
INC1461310	04-20-2015 07:58:47 AM	4 - Elevated	Open	TFS- 527668 - FAST
INC1589938	05-18-2015 11:56:24 AM	4 - Elevated	Open	TFS 545483 -FAST g
INC1600348	05-20-2015 08:52:08 AM	4 - Elevated	Open	FAST-scanner promp
INC1632470	05-27-2015 10:44:37 AM	4 - Elevated	Open	TFS-559089-Insuffici
INC1787268	06-22-2015 09:06:30 AM	3 - High	Open	TFS- 580388 Cannot
INC1829466	07-01-2015 06:49:30 AM	3 - High	Open	TFS- 579484 -FAST

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Questions and Discussion



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The background of the slide is a soft, golden bokeh effect with out-of-focus light spots. At the top and bottom, there are decorative borders featuring intricate, golden, mandala-like patterns.

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