

HDI®

GET READY FOR THE
(R)EVOLUTION
OF SUPPORT AND
SERVICE MANAGEMENT

CONFERENCE & EXPO

Session #606: How to Make Better Business Decisions
Utilizing Data, Knowledge and Analytics: A Roundtable
with First American

Peter McGarahan, Mary Cruse and Brad Biagi

#HDIConf

Roundtable Purpose

- To make better decisions based on data quality, the relentless questioning, and taking measurable action based on your findings.
- To share our methodology around selecting, extracting and analyzing the relevant data on a regular basis for refined questioning.
- Learn how to conduct "data deep-dives", identifying continuous improvement opportunities, focused on daily service operations.

How this workshop works...

High points of approaching decisions through Data Analysis



Working with your tablemates to frame your own “take home” project

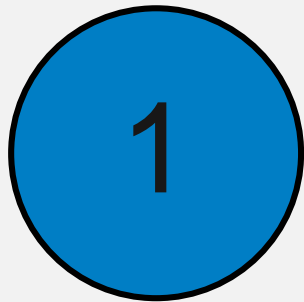


Support you through our experiences



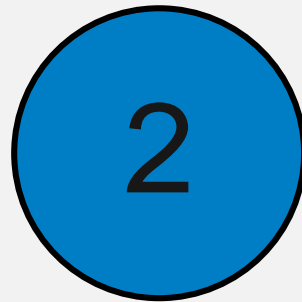
Align you with “accountability-buddies!”

Goal of Analytics



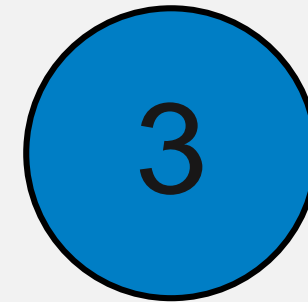
What do you want to achieve? Desired impact?

- Increase FCR
- Increase Self Service
- Problem elimination
- Agent efficiency (AHT)



What are the

- End results?
- Benefits to the customers/business?
- Impacts to Service Levels?
- Changes in how you do business?



Strategic alignment

- IT strategy
- Corporate strategy
- Alignment

Determine what areas in your Service Desk to investigate and why.

Determine how these areas are measured and where is the data source.

Understand how best to extract the data and load it into an analysis tool like Excel (e.g. Pivot tables).

Start by filtering, sorting, graphing, questioning, observing, brainstorming, etc.

Begin to formulate assumptions, hypothesize, continue to question, observe to confidently know, bring in others for their perspective.

Methodology

Elements of a Good Problem Statement

Describes what the problem is, what the defect is, what products or processes are defective.

Identifies where the problem occurs and what part of the product or process is broken.

Depicts when the defect was first observed, the history of the problem, and if there are any patterns.

Explains how extensive the problem is; how many products are defective; or how often the process functions improperly as well as portrays any trends.

Basically the Problem Justification explains how you know the problem is a problem and expresses directly or indirectly why the project is important to solve now.



Clearly state the problem and why the problem is important to solve now!

Roundtable #1: Write Your Problem Statement

Metric & Reporting Maturity

Service Costing KPI & Cost Breakdown
621400, 621500, 801000 removed from TCO for all Services

		Cost Center	Q1			Q2		
			Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17
USER SERVICES								
Desktop Field Services		07205						
KPI	Incident Management	80%	90.45%	90.47%	88.89%	89.89%	88.09%	86.79%
	Customer Satisfaction Index	4.90	4.88	4.83	4.86	4.90		4.90
	Service Request Provisioning	80%	89.16%	86.40%	86.16%	84.53%	84.72%	84.91%
COST	TCO		\$424,722	\$418,270	\$481,368	\$470,852	\$543,594	\$495,305
	% of Time Spent on Costing Unit	70%	\$297,305	\$292,789	\$336,957	\$329,596	\$380,516	\$346,714
	Unit of Cost Tickets		4911	4874	6828	5429	6875	6717
	Cost		\$60.54	\$60.07	\$49.35	\$60.71	\$55.35	\$51.62
END USER SERVICES								
IT Service Desk		12855						
KPI	Call Answer Timing	80% <90 seconds	66.00%	47.00%	67.00%	65.00%	63.00%	66.75%
	Abandon Rate	<10% avg qtrly	6.00%	12.00%	7.00%	7.00%	7.00%	6.01%
	First Contact Resolution	64%	71%	70%	70%	70%	71%	68%
	Incident Management	80.00%	98.58%	98.50%	97.49%	96.52%	97.66%	97.87%
	Customer Satisfaction Index	4.90 mthly avg	4.91	4.93	4.92	4.90		4.93
COST	TCO		\$150,314	\$136,991	\$152,204	\$147,975	\$142,959	\$155,063
	Less 20% Administrative		\$120,251	\$109,593	\$121,763	\$118,380	\$114,367	\$124,050
	Unit of Cost Total Tickets		14795	13490	16169	13826	14850	14528
	Cost	17.88 (Gart)	\$8.13	\$8.12	\$7.53	\$8.56	\$7.70	\$8.54

To get value in data analysis, data and reporting must be clear, accurate, direct and maintain a balanced perspective

What metrics do you report regularly report and why?

What is the data source, calculation, meaning of metric, confidence level, trending and rippling effect?

What are the benchmarked/targeted results, what are the gaps and why?

Data -> Metric-> Measuring-> Reporting

Baselining!

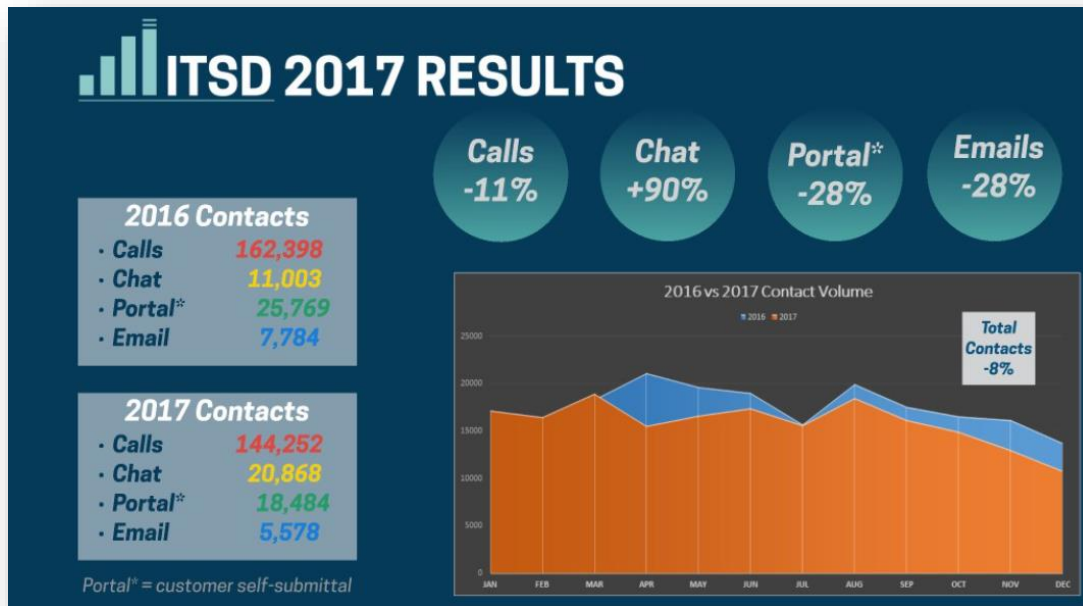
- Where are you beginning your journey?
- How do you know when you make changes you've made success?
- Progress measured against goal – industry benchmarks:
 - **Baseline:** the measure of where you begin your journey
 - **Actual:** the measured metric on a period basis (day, week, month)
 - **Target:** the metric goal as defined by industry benchmarks such as HDI, Gartner and MetricNet.

What is not **defined** cannot be **controlled**,
What is not **controlled** cannot be **measured**,
What is not **measured** cannot be **managed**,

Ultimately...

*What is not **defined, controlled, measured and managed** cannot be **IMPROVED!***

Reporting and Storytelling



Who are you telling the story to and what do they care about?

Know your audience and the story you want tell.

Relational data – Volume/Abandon/ASA all on one graph

Ticket types/categories/trending

Representing data in graphical way

Make it personal – have a meaningful impact

Demo: Manipulating Excel Data

- Perform call analytics / call mapping to identify important call type characteristics for addressing both from a shift-left strategy perspective.
 - Prior year call types vs. this year's call types
 - Technical (complex), Operational, Request, Break / Fix, Status Update, Repetitive.
- Show the data, show the reports, graphs and stories
- Challenge the data and ask the right questions about what areas are in need of attention and improvement.

Roundtable #2: Prepare your data

QUESTIONS, QUESTIONS, QUESTIONS

What data do you have? What sources? Is it GOOD?

What data DON'T you have? Why? Where can you get it?

How will you use your data to compare and contrast?

What questions should you ask? Is it explainable?

How do you confidently know the data is supporting your research/improvement efforts?

How will data be presented?

Who is your audience?

What's your STORY?

Tell a Cohesive Story

Your agenda should include the what, when, where, how, and why of the business proposal

Why is this change needed (issues & opportunities)?

How will this change solve these issues or opportunities facing the organization?

What is the recommended solution?

How does the solution address the issues or opportunities? What are the benefits?

What will happen to the business if the change is not undertaken (the do nothing scenario)?

When will the solution be deployed?

How much money, people, and time will be needed to deliver the solution and realize the benefits?



Share Your Thoughts & Shape
the Future!
*Thank you for attending
this session.*

Please complete the session evaluation form
www.HDIConference.com/Eval
or on the **App.**

Evals4Education: For every completed evaluation, HDI will donate \$1 to the Tangelo Park Elementary School through AdoptaClassroom.org!

