

## Incorporating Help Desk Metrics Into SLAs

**CSDs can display their value to the bottom line by moving beyond traditional statistics and by tying their performance to business goals.**

### Core Topics

IT Management: IT Support Service Management

### Key Issue

What IT service strategies and practices will enterprises use to manage and optimize IT investments?

### Strategic Planning Assumption

By 2002, 65 percent of IS organizations will have implemented business-oriented metrics in service-level agreements. Those that stay with traditional call center metrics will risk being outsourced (0.7 probability).

### Note 1

#### Benefits and Challenges of Support Metrics

##### Benefits:

- Obtaining an understanding of services provided
- Justifying the level of service to senior management
- Obtaining funding for technologies and additional resources

##### Challenges:

- Creating consistent processes and procedures
- Integrating platforms and applications
- Establishing well-defined organizational structures
- Simplifying agreement targets and communication
- Managing over-aggressiveness
- Dealing with tool immaturity

### Note 2

#### General SLA Content

- Mission
- Time
- Workload
- End-user style
- Dispersion
- Help desk
- Help desk outsourcing
- Help desk tools
- SLAs

Most IS organizations have difficulty identifying which service-level objectives to track. A clear sense of direction is needed to meet the required business objectives in distributed environments (see Note 1). The goal is to develop a measurement process for support that moves beyond indicating *what has happened* to indicating *what should be done*. This *Research Note* highlights guidelines on how to incorporate more than traditional call center measures into service-level agreements (SLAs).

**Emphasize process development.** Effective management of distributed computing environments requires the development of a consistent process for defining, tracking and measuring service levels. Well-defined management processes, which define the IS management infrastructure and specify the measurements, are as important as technologies and functional processes to the success of consolidated service desk (CSD) implementation. Unfortunately, many IS organizations are often unable to define consistent, value-add metrics, as it forces them to confront weaknesses and identify gaps in service coverage. While end users and senior management often expect “ideal” service levels, the reality is that actual service delivery vehicles, such as hardware, software and personnel, are not perfect, creating an expectation gap. The most successful IS groups set appropriate expectations by developing SLAs in conjunction with end users and senior management.

**Change the focus on metrics.** Support organizations can display their value to the bottom line by moving beyond traditional statistics and by tracking business-related metrics. It is critical for the support function to work in conjunction with business units to establish what is important to them (see Note 2) in service contracts. To move away from a “pass-through” help desk where the response time (e.g., the number of rings before a call is answered) is measured, enterprises need to focus on

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## Metrics for Management of Help Desk Personnel and Process

- Call profile
  - Type (e.g., help vs. request)
  - Priority (Four levels of severity)
- Contact method
  - Percentage by telephone, e-mail, voice mail, walk-in, fax
- Breakdown by product/platform
  - Shared systems, desktop-tethered, mobile
  - In-house applications, purchased applications
  - Client/server, file server, personal productivity
- Duration of calls
  - Average call duration
  - Breakdown of duration by segmentation (five, 10, 15 minutes, etc.)
- Escalation
  - Percent escalated
  - Average number of hand-offs per escalation
  - Profile of typical escalation
- Hand-offs
  - Percent handed off
  - Average number of bounces per hand-off
  - Profile of calls being handed off
- Closure
  - Average time to closure
  - Percent closed using age segmentation (first call, two hours, etc.)
  - Percent resolved at Tier 1, Tier 2, Tier 3
  - Average number of hand-offs before closure
- Phone response profile
  - Average answer time
  - Hold queue: percent of calls and average length in queue
  - Abandonment rate: Normal business hours, after hours, special event (outage)
  - Voice mail: percent of calls that roll into voice mail
- SLA compliance
  - Percent of time in which the SLA is not met
- Staffing:
  - Ratio: End users to help desk staff
  - Ratio: End users to tech support staff
  - Turnover percent by Tier 1, Tier 2, Tier 3, managers
- Time analysis
  - By hour of day
  - By day of week
  - By time of month
- User/customer satisfaction
  - Quick follow-up to actual help desk calls within one week of call
  - Snapshot survey of all end users
  - Detailed interviews with selected end users and managers

## Metrics for Establishing Value With the Business Unit

- Service requests/calls
- Call avoidance by severity type
- Estimated cost savings in terms of resources and business value
- First-point-of-contact resolution to increase end-user productivity
- Workstation availability
- Network availability

metrics based on a “problem resolution” help desk, for example, where first-call resolution, mean time to repair, and estimated call avoidance figures are measured. Traditional metrics should be translated into estimates of direct benefit to the business units (e.g., cost savings of problem avoidance achieved through call-volume reduction from proactive analysis, or reduction of Severity Level 1 problems). Other measures continue to rank high in importance, such as quantitative aspects of support, call volume, availability, response time and resolution percentage. Since the CSD’s primary focus should be problem resolution (and ultimately avoidance), the critical measurement criteria are the total inquiries logged and resolved at each level. The metrics should remain relatively simple in the beginning, focusing on major categories that end users demand and the IS group can adequately track, with more-detailed metrics phased in gradually over time.

**Prepare for performance monitoring.** Subjectively, the CSD should survey end users on an ongoing basis and provide the IS staff and senior business management with feedback. The CSD manager should monitor generated reports, handle daily meetings to discuss root cause resolution, and analyze staffing requirements by service demand. Management should not overestimate IS service capabilities, making a benchmark of current IS service levels a critical success factor. Once the CSD performance has been measured, it is possible to set, monitor and achieve realistic goals within a specific time frame and relate those successes to end users and senior management. Service-level metrics provide the IS organization with a baseline for expectation setting and negotiation. With consistent measures, the IS organization can map the impact of new technologies on service levels, as well as utilize service levels to justify tool acquisitions, head-count additions, budget proposals and chargeback processes. However, the technologies currently available to manage and measure service levels are immature, forcing the IS organization and the CSD to rely more on process and procedures.

**Bottom Line:** Once help desk performance has been measured, it is possible to set, monitor and achieve realistic goals within a specific time frame and relate these successes to end users and senior management. Most SLAs fail when they do not demonstrate their value to business units. While SLA metrics are critical to successful management, the IS organization should beware of three metrics development challenges: complexity, over-aggressiveness and tool immaturity.

