

*Smart Reporting:
Using Your Service Desk to Better
Manage Your IT Department*



Making Technology Work for You

Smart Reporting: Using Your Service Desk to Better Manage Your IT Department

Introduction

Need to identify problems in your IT organization? Or, better still, anticipate them? Use your Service Desk. Trying to allocate resources in both peak and off-peak periods? Or maybe prevent equipment failures for your end-users? Again, your IT Service Desk has news you can use! As the single point of contact and control for all incidents and service requests, the service desk (or help desk) can provide valuable insight. The key to tapping the full potential of this treasure trove of contacts is having a reporting system that can convert *volumes of data collected into meaningful information.*

The average help desk reporting system focuses on tracking single transaction data such as call-answer time, resolution rate, and the like. While these are certainly key metrics for managing help desk operations, they fall short if you want to use the information to plan, troubleshoot, or manage at the department level. *Easily accessible, executive dashboards* – with full drill-down capability – are needed to tackle these higher level tasks.

The more robust reporting applications provide trend information first by establishing an initial baseline and then by tracking data over time. *As ongoing transactional data is summarized and formatted, patterns emerge.* And perhaps more importantly, deviations also surface. With the right summarization and formatting, bulk data quickly becomes a valuable tool for making better-informed decisions on a range of topics: from resource allocation, hardware planning, and troubleshooting to cost reduction efforts and employee productivity.



Ask Yourself the Following Questions...

to help determine whether you can benefit from better reporting:

- Can you track misrouted tickets, and do you know how much time is spent re-routing tickets to the proper owner?
- Do you have an executive dashboard that allows you to drill down on important details?
- Can you easily use service desk history to help you predict spikes and schedule resources for peak periods?
- Does your reporting system help you identify faulty hardware before it fails on an employee?

If the answer is 'no' to any of these questions, then read on!

Quick Case Studies:

Reporting that Improves Operational Efficiency

The best reporting systems don't just alert you to a problem. They provide you with enough information so you know exactly **where to start troubleshooting**.

At the service desk of a large networking and communications technologies distributor, when a ticket was escalated, it routed to one of 25 different groups, including several subgroups. The reporting system alerted managers to a troublesome instance of misrouted tickets, specifically 3.5% of the 4,000 generated per month. Additionally, the system also tracked exactly where the misrouting was occurring, revealing a consistent pattern of confusion. Armed with this information, those charged with reducing misdirected tickets could focus immediately on fixing the break in the process rather than first having to spend valuable hours on simply identifying where tickets were going astray.

Upon further investigation, management was able to quickly identify the cause for tickets being misrouted and determined the error existed in routing instructions. New documentation was provided coupled with additional agent training on the



firm's complex routing procedures. Management was able to reduce misrouted tickets to less than 1%. The productivity of the technical staff increased and customer satisfaction rose as well.

Reporting that Measures Performance

As help desk performance has a direct bearing on overall employee productivity, the IT Department head needs reporting that can alert him or her to dips in the IT Service Desk performance.

At one ABS client, such executive summaries noted a bump in open tickets. Fortunately, the reporting system did not merely capture surface information, but crucial detail regarding open tickets (count, days open, type of ticket left open, agent / engineer / technician involved, etc.) was also stored and accessible.



Tapping drill down functions, management personnel could quickly identify the source of increase and type of tickets held open, allowing them to target improvement efforts on a narrowed group of agents, technicians and ticket type. Summarized trend information helped management discover the problem and react accordingly; fast access to the details put them on the path to quick resolution.

Reporting that Assists in Scheduling/Resource Allocation

Up-swings in call volume can tank customer satisfaction levels if too few agents are available. To handle common weekly peaks and/or seasonal periods, or application migration spikes, call history can prove extremely helpful in anticipating and scheduling the right level of resources. Each organization has volume fluctuations all its own. For example, one ABS client, a university, noted a trend in its reporting that indicated peak time periods when more applicants call (e.g., January and July).



Accordingly, they now know to add staff – and by how many – during these spikes. Another client, a major hospital, was about to roll out a new module of its electronic medical records (EMR) application. They studied the reporting history provided when bringing a similar module online. Summaries helped them determine not only the extra staffing level needed but also the degree of higher training required for agents and technicians to ensure a smooth roll-out. In both instances, IT managers capitalized on reporting features that provided relevant, detailed history to anticipate and plan for future resource needs.

[Reporting That Helps Tackle Equipment Issues](#)

Identifying faulty equipment, before it inconvenienced an employee, is exactly what one ABS client was able to do, utilizing information sourced from the help desk. Summary reports noted an unusual uptick in calls for failed keyboards. In drill down, the reporting also noted repeated instances from the same model number. The IT Director decided to replace the remaining keyboards from that model number before they failed and was able to staff the replacement project using less skilled personnel. By cutting the keyboard failure off at the pass, the IT Director successfully avoided calls to the help desk, lowered his cost of ultimately having to replace the failing keyboards, and saved the organization's employees both frustration and downtime.

Key Features to Look for in a Reporting System

It's true: not all reporting systems are created equal. When evaluating multiple help desk tools or outsourcing partners, don't overlook a thorough vetting of the reporting function! The dashboard, scorecards, and reports integrated and separated by media response are three key markers helpful in evaluating whether the system will provide you with relevant executive information, not just volumes of extraneous data.

Be sure to ask for...

**User Friendly
Dashboard**

"Scorecards"

**Integrated Responses
by Media**

Customized Reporting



What good is information trapped in the help desk system? Accessibility is paramount and one of the most important features in a reporting system is, therefore, a user-friendly **dashboard**. Specifically, look for one that *summarizes* transactional data over time for you so you can easily monitor ongoing performance and identify changes in trend data. Such summaries alone are not sufficient; however, we all know “the devil is in the details.” Make sure your dashboard allows you to drill down from a high level into the specifics of troubling trends.

Quick views of summarized information or **“scorecards”** are another critical tool provided in the best reporting systems. Often custom-developed for a specific company’s needs, these one page summaries are easy to read and absorb so executives can monitor essential metrics at a glance. Again, the drill down capability should be integrated for further examination and analysis.

ABS help
GLOBAL KNOWLEDGE CENTER

Interactive Report Card
Bookmark

Date Range Last Month ▾

Start Date - End Date
11/1/2010 - 11/30/2010

Run Report Send to Printer

Overview Report for Last Month
Start Date:11/1/2010 to End Date:11/30/2010

Call Metrics												
	ASA	LSA	Total Offered	Answered	Answered Within SLA	% Answered Within SLA	Abandoned >60 Secs	% Abandoned >60 Secs	Avg Time before Abandoned	Avg Call Length	% of Total Contacts	Notifications
Voice	0:00:31	0:09:33	1189	910	910	100%	32	2.6%	0:00:20	0:04:35	75%	
Chat	0:00:00		0	0			0	0.0%		0:00:00	0%	
Voicemail	0:04:37		9	9		0.7%	0	0.0%		0:05:21	0.5%	
Email	0:08:12		363	363			0	0.0%		0:05:13	22.9%	35
WebSubmits	0:14:59		24	24	23	95.8%	0	0.0%			1.5%	
Totals			1585	1306			32					

Overview Groups Individuals

Overview
Start Date=11/1/2010 End Date=11/30/2010

Report sample



Additionally, look for a system that can both **integrate and segregate data from multiple media responses**. Many systems combine metrics of voice, email, web submit, and chat support, but can your system also track each separately? Cost, performance, and customer satisfaction can vary significantly across these three communication modes. For example, email is typically a slower process, fixing problems over days and multiple email exchanges. Voice, by contrast, can offer more rapid resolution if answered quickly and all relevant information is obtained on first contact. One ABS client, in reviewing their segregated reporting metrics noted disproportionately heavy email usage with corresponding slower resolution times. The company considered eliminating email and moving exclusively to voice and web submission. With solid reporting – by media response – the IT Department head knew what the increased costs and the improvement in resolution time would be with such a move. The company made a well-informed decision and ultimately eliminated email support.

Finally, while out-of-the-box reports are valuable, you will eventually want your data sliced and diced in a way that is meaningful to you. Be sure to allocate the proper technical resources such as developers and database analysts who can create the **customized fields and reports** that are most beneficial to your organization...or ensure that your outsourcer includes these capabilities in its offering to you.

Apples to Apples, Please!

Reporting is a *critical* component to an effective service desk. With its relevance well beyond simply optimizing help desk operations, it is often overlooked in comparing one help desk tool or outsourcer to another. Why include this when your company is comparing help desk options (whether a tool or help desk outsourcing vendor)? First, think about all that data flowing into your help desk every day – and what incredible value that information can provide. Now, imagine having information at your fingertips that can help you lower cost, make and justify resource decisions, and strengthen/defend high customer satisfaction.

And, it's all from your help desk!



About ABS Associates

Founded in 1982, ABS Associates is a global IT solutions provider of helpdesk, desktop, managed hosting and network support and services. The company delivers a 95%+ satisfaction rate and serves clients throughout North America and in 14 countries around the world. The mission of ABS is to make technology work for its clients, whether that means implementing an onsite or virtual helpdesk, hosting complex applications, or resolving problems with servers. ABShelp™, the company's web-enabled global knowledge center, assumes the burden of IT support, eliminates distractions, and allows firms around the world to concentrate on achieving strategic business objectives.

