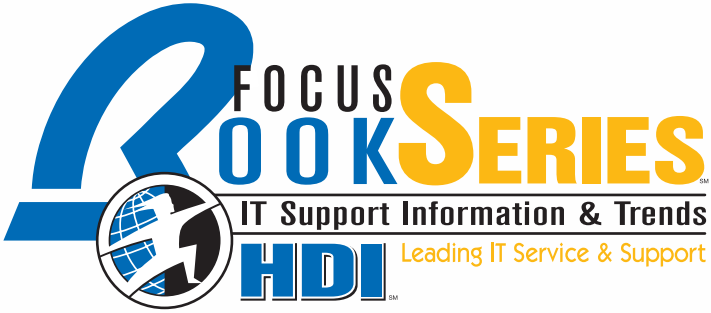
The Executive's Guide to Understanding Technical Support

Robert S. Last
Content Manager, HDI



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HDI[SM]
102 South Tejon Street, Suite 1200
Colorado Springs, CO 80903 USA
U.S. and Canada: (800) 248-5667
www.ThinkHDI.com

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About the Author

Robert Last has over 18 years of experience in the support industry as a support manager, consultant, and trainer. He was a supervisor for the help desk at Cleveland State University for eight years, and the support manager for DataVantage, Inc. in Cleveland for three years. He is currently the Content Manager for HDI. He is the author of over two dozen articles and papers on technical support.

Introduction

Among support center managers and the executives that they report to, there is often a dialog of the deaf that has done nothing for customers, careers, or organizational productivity. This soundless dialog is the result of overwork, the conflict that comes from trying to implement the directive of "do more with less," and the misunderstandings that have come to define the relationship between the CIO or IT manager and the support center manager. Happily, these misunderstandings are fast coming to an end as both parties and their CEOs come to realize that the only true differentiator among companies and products is the quality of technical support that is provided along with those products.

For support centers supporting internal customers, the surest method of survival in an organization is too overwhelm one's customers with care, service, and support to the point that any attempt to reduce services, outsource, or eliminate them is unthinkable.

Working on the assumption that CIOs and other IT executives have little time to waste, this Focus Book has four chapters:

- **Chapter 1—**"What the Support Center Does for Your Organization" provides a brief history of the IT industry and discusses the unique position that the support center holds in an organization and the services that it can provide.

- **Chapter 2—**"How to Staff a Support Center Without Guesswork" explains the most common methods for calculating the headcount necessary to staff a support center. These methods are statistical in nature and are designed to take the guesswork out of staffing decisions.

- **Chapter 3—**"The Nature of Inbound Telephone Calls" explains how customers act when they are trying to contact a support center.

- **Chapter 4—**"The Support Metrics Program" explains why metrics are important, examines the basic support metrics that most support centers will capture and analyze, and introduces the Balanced Scorecard Service Model to the reader.

- **Appendix 1—**"The HDI Maturity Model" offers a vision of the future for IT executives and support managers.

Taken together, these chapters provide a brief introduction to the concepts and techniques that go into the management of a support center as a strategic asset.

Chapter 1
What the Support Center Does for Your Organization

The Value of the Support Center

The question that is most often asked by executives that are responsible for a support center is, "What is the value of a support center?" That's a fair question and one that the technical support profession has had difficulty answering because of the youth of the profession. The answer is actually very simple:

> ***The value of the support center is the role it plays in maintaining the productivity of those employees in the company and organization that depend on IT to do their jobs, and to collect, analyze, and disseminate information about the operation of the IT infrastructure and its impact upon the business or organization.***

An effective support center routinely positions its service and support as strategic leverage points to boost productivity, raise customer satisfaction, and increase business success. This philosophy is now called business alignment and focuses on support services providing:

- Improved productivity
- Enhanced customer service that creates a "WOW" for customers
- Increased success rates for new product and service introductions
- Increased service quality and even account management services
- Reduced total cost of customer service and support
- Increased revenue potential

The consequence of not having a support center is less effective employees. An ineffective or informal support center will foster the development of "informal support networks" that will burden those in that network and provide inconsistent, unmonitored, and unorganized support services. The IT organization continues to evolve and has become the operational backbone of all organizations. Part of this evolution is growing standards for IT governance that align IT services with the business objectives of the parent organization and increasing efficiency, effectiveness, and productivity at a lower cost. When these cost savings are compromised by an interruption in IT services, the support center is there to record the details and circumstances of the incident and to facilitate the solving of the problem. The support center manages risk, solves problems, and saves money on behalf of the entire organization; the hard part is communicating this value.

Look at your existing support operation and imagine what life would be like for your organization's employees if it were not answering the telephone, responding to e-mails, faxes, walk-ups, and chat sessions. Consider what would happen during your next hardware or software rollout if your employees or customers did not have a have a support center to contact. Who would they call?

For profit-oriented companies, "…it is increasingly the quality and variety of the accompanying service that makes the critical difference between success and failure in the marketplace."[1] Support has become a revenue center in its own right, and while not as efficient and effective as it should be, or could be, the fact that it exists indicates the value that it provides to a company. In addition to answering the usual end-user questions, support centers also are positioned to deal with and report on, the following IT and organizational challenges:

[1] Albrecht, Karl and Ron Zemke, Service America in The New Economy, Revised Edition, New York: McGraw-Hill, 2002, P. 13

- **Identifying waste—**Refers to the time, money, or other resources that are wasted and do not contribute directly to increased user productivity, or may even result in lower productivity.

- **Mistakes—**End-users make mistakes.

Of equal importance is the information the support center gathers about the IT infrastructure and its operation. Despite the resiliency and sophistication of today's IT systems, sooner or later, something will happen that is, or is perceived as, a departure from normal operation. When that happens, the end-user will either call or e-mail someone to report the anomaly. Even more likely, the end-user will forget something about the systems operation or have a question. Who will they call or e-mail to answer the question? A well-managed support center can be the definitive source for IT-related operational information and the repository of the massive amount of information that organizations generate every year. In fact, knowledge management is one of the fastest growing aspects of the support profession and support center managers are taking the lead in implementing knowledge management programs for their organizations.

A Brief History of Technical Support

Twenty years ago the processes, the technology, and the doctrine that we know today did not exist and technical support was the informal responsibility of the guys—it was almost entirely male in those days—in attending to the mainframe in the basement and working for the data processing department where they spent their days programming, operating, and monitoring the mainframe. In the 1950's and the 1960's, mainframe computers were primarily in the business of running transaction processes and generating management reports. Unlike today, transactions were collected and stored on the mainframe and run at one time in a batch process.

In the 1970s, the computer terminal (the "dumb" terminal or the CRT) gradually became a standard office tool. What was nice about the terminal was that it allowed anyone to interact with the mainframe from their desk without the ugly process of punching cards or request forms to programmers. An accounting clerk, for example, could run a program to prepare a payroll report directly from a desktop terminal and direct the report to a series of printers. The DP staff wasn't exactly thrilled with this arrangement because they had to trust the accounting clerk not to make any mistakes, ask any questions, and complete their tasks on time. In addition, they also had to answer questions and solve problems for the accounting clerk and that took time and money. With the emergence of the minicomputer, for example the IBM AS/400, computing became even more accessible. Where a mainframe could cost as much as $1 million or more, the minicomputer could be purchased for $100,000 and $500,000 and were affordable for small businesses and individual departments; and if there was a problem, you could still call a specialist in the "computer room."

In the 1980's and the 1990's large numbers of employees began to use microcomputers with prices in the $2,000 range. This drop in the price of computers introduced the knowledge worker to the workplace as the U.S. economy began its shift from an industrial, mechanical one, to an electronic, knowledge-based economy. With inexpensive software and graphical user interfaces (GUI), the knowledge worker was not only able to work smarter, but intuitively as well. Users could happily forget the numerous programming commands that they were forced to learn and with a few simple MS-DOS, MacOS, and Windows terms, everything about using a computer became easier compared to using a dumb terminal. Finally, thanks to the folks at the Palo Alto Research Center (PARC) and two guys named Gates and Jobs, the computer mouse made the words "point-and-click," "Mouse," Windows, and Mac part of the English language while increasing productivity and lowering costs. Computing had begun to reach the masses.

Problems and questions from end-users were recorded on pink message slips and thrown in a pile on a desk near the entrance to the operations office, or placed in a revolving message holder. Whoever went for coffee next, picked up a handful of slips and walked to the desk of the person reporting the problem and took care of it. As the PC and client-server technology became standard business tools, there always appeared to be one person in each department that was "good" at solving PC problems; we'll call him "Joe." Joe had a primary job that he was paid for and a secondary job supporting his coworkers every time they had a problem or a question. As business software became standardized on Microsoft platforms, the pace of calls from novice users and seasoned professionals increased dramatically as "undocumented features" caused problems and delays in completing daily tasks and projects resulting in acute frustrations among end-users. Very quickly it became apparent that Joe was overworked, largely unprepared for his end-user support role, and kept almost no records at all.

The next step in the evolution, driven primarily by Joe's lack of training in customer service skills, knowledge management, and administration, is the model most common today—the technical support center. This model was created to better service customers, reduce complaints, and eliminate the redundant questions being routed to the informal support network. These support centers were staffed by technical experts who resolved technical issues over the phone, or were dispatched to the customer's desk to solve a problem.

This form of support center did not have automated call-tracking or problem management systems. Problems were often reported and tracked on paper or in-house systems that were rarely updated. The reliance of the organization on automation resulted in significant changes in the support center environment. Support grew from a transaction-based service, with little input from customers, to an integrated, customer-focused, highly valued, but still misunderstood, company asset.

The Information Technology Association of America (ITAA) does an annual IT Workforce Survey. The total number of individuals within IT has now reached 10.5 million (2004). The number of individuals identified as being in technical services is 19 percent of the total number and the number in programming positions is 20 percent. Technical services will likely pass the programming position by the end of 2005. This fact illustrates the shift in IT job functions and the growing importance of technical support.

More and more, the support center industry is focused on the need to deliver support in a professional, timely, and cost-effective manner that meets the needs of both the customers and the parent organization. Today's support center is focused on the following roles:

- To be the Single Point of Contact (SPOC)
- To provide responsive and consistent service
- To be a strategic asset to the organization
- To provide customer and/or technical assistance services
- To maintain/improve performance at the highest level possible

The Future of Support Services

The role of the support center continues to evolve in most organizations. Many support centers are no longer only a technical support center, ***they are THE single point of contact (SPOC) for any questions a customer might have,*** and they are responsible for routing/transferring the customer to the appropriate group if the support center is unable to resolve the request. The scope of support center services will continue to increase as new programs intended to contain costs and improve customer satisfaction are implemented. To meet these new challenges, support centers will need to reinvent themselves and utilize new technologies and tools to meet these challenges.

Today, most proactive services provided by the support center are limited to system and network monitoring tools which alert them to situations prior to customers notifying them of a problem. The support center of tomorrow will be expected to provide a truly proactive approach by notifying customers of failures and/or eliminating the interruptions before they happen (e.g., automatic download of fixes for customers who have a high probability of encountering a known problem).

The support center of tomorrow will move beyond today's tools (e.g., remote control, remote maintenance, and remote diagnostic tools) and understand how to achieve higher levels of service through the use of more sophisticated tools and technologies (i.e., self-healing and self-help). Support centers will also embrace the use of metrics, the Balanced Scorecard Service Model, and the Information Technology Infrastructure Library (ITIL) to aggressively and proactively manage situations that effect customers and their parent organizations; how efficiently contacts are handled will be only one aspect of how they fulfill their mission.

Support Center Service Trends

Support centers are playing an increasingly strategic role in the health and performance of all types of organizations. As solutions and technologies become more complex, the support center's role in resolving tactical technologies on an ongoing basis will assure the successful deployment of rollouts, products, increased customer satisfaction, and early adoption. Organizations are beginning to realize that support centers must be aligned to the core of their business and organization's mission. As such, organizations continue to expand the role of the support center by integrating it into:

- Customer satisfaction efforts
- Product development
- Marketing, sales, and service functions/activities
- Change management

While integration into other business functions continues, support centers are still measured by profitability and cost management. High levels of support and customer satisfaction, and even loyalty, are expected despite:

- Economic variability
- High levels of employee turnover
- New demands on the support center (for example, support centers need to support more products with less staff)

The increased value of the support center is supported by the following technological trends:

- Increasing use of self-help technologies
- Rising reliance on knowledge management and knowledge tools
- Improved usage of real time collaboration or remote control tools
- Sophisticated problem solving and troubleshooting techniques
- Integration of asset metering and management tools

While the support center is now critical to the health and performance of an organization, it is often still marked by a less than glamorous image and status within the organization, and to the outside business community as a whole. This status is quickly changing. Support centers are increasingly seen as the core of an organization's:

- Technical proficiency
- Attitude towards customers, employees, and partners
- Communications to the Chief Information Officer (CIO) or executive management team
- Support center employment and management, which has truly come of age and is now a profession in its own right

Chapter 2

Workforce Management: How to Staff a Support Center Without Guesswork

One of the most important and least understood aspects of support center management is staffing; how many people does it take to have an effective support center? Workforce management refers to the way in which staffing levels, analyst availability, the need for additional resources, both internal and external are scheduled to meet SLAs and how these are determined. Staffing and scheduling can be a very time consuming, and sometimes frustrating, task. Too few people, and the customer waits for a response forever (the customer perception of a wait time is three times higher then the reality); too many people, and the budget is busted. There is a sensible middle-ground that can be obtained using an understanding of the dynamics of inbound contacts, statistical calculation, and sophisticated software. The one method that is NOT useful in determining the headcount of a support center is to wait until your customers are complaining and your staff is exhausted, before adding more staff.

Staffing for Contact Channels

Another misunderstood aspect of support center management is the importance of identifying HOW customers contact a support center. The dominate contact channel is still the telephone, but two decades of experience has taught us that customers will happily use, and now expect, alternative methods of contacting a support center.

In addition to the telephone, customers now and still have, available to them the following contact channels:

- E-mail
- Internet Relay Chat (IRC) or Chat and Instant Messaging (IM)
- Self-service Tools
- Web Logging of Incidents
- Fax
- Walk-up or Walk-to

Each of these contact channels requires a conscious assessment of the workload that they will generate and the costs they will incur. Simply assigning people to respond to the incidents, inquiries, and questions from each contact channel in isolation from each other is wasteful and counterproductive. The experienced support manager will be able to assess the potential workload from each channel and use that information as part of their staffing calculations. These calculation methods are discussed below.

Methods for Determining Staffing Needs

The first step in building a support center cadre is to determine the number of staff needed—referred to as a staffing level. There are three popular methods to determine staffing levels; the Staffing Ratio Method, the Gross Staffing Level Model, and the Erlang Software Method.

The Staffing Ratio Method

The Staffing Ratio Method is a helpful tool for startup support centers, which have no historical data with which to work. This method uses industry averages, based on conditions and other factors, which help a support center manager make an educated guess at the number of staff that will be needed.

The baseline figure for staffing ratio is approximately one analyst for every 80 to 260 customers. The exact ratio depends on the

technical savvy of the customer base. If most of the customer base are technically competent and highly mobile (translating into a higher complexity of problems and questions), the ratio will be 1:80-110. If most of your customers are not technically proficient and are mostly static in their location, the ratio will be higher, more like 1:120-160. Obviously, there will be some educated guesswork involved in this ratio.

Unfortunately, with the economic pressures of today, many organizations have had to sideline staff ratio analysis to accept mandates of reduced staffing for cost-cutting purposes. This approach is an example of arbitrary business decisions impacting customer service, employee satisfaction, and support center productivity.

Gross Staffing Level Model

A more accurate staffing model is the Gross Staffing Model. This method is helpful for established support centers that do have historical data with which to work. It is extremely important that the historical data be accurate for this method to work well, particularly the annual contact volume. This underlines the importance of ensuring that the support center cadre, and anyone in the organization that speaks with a customer, logs every incident. The Gross Staffing Model method can be done in four steps below:

1. **Research**
    a. Determine the number of incidents received (per year)
    b. Determine the average incident-handle time (include after call work time)
    c. Categorize by customer department, problem type, contact channel, product, etc. (optional)

2. **Work Hours**
   a. Determine Total Work Hours Required (TWHR) per year
   b. [# Incidents per year] X [Avg. Incident-handle Time] = TWHR (per year)

3. **Work Hours Available**
   a. Determine Actual Work Hours Available (AWHA)
   b. [2080 Potential Work Hours (PWH)] - [Vacation, Sick Days, Holidays, Breaks, etc] - [Training, Projects, Administration] = AWHA

4. **Staff Required**
   a. [TWHR] ÷ [AWHA] = GSL (# of staff required)

5. **Utilization Rates**
   a. Check totals against the preferred Utilization Rate (UR) of 65-75% per analyst
   b. AWHA ÷ PWH = UR

At the conclusion of these calculations, the Rostered Staff Factor for the support center will have been determined. The Rostered Staff Factor is the base number of analysts needed to staff a support center on a daily basis. It assumes that no one will go on a break, eat a meal, go to a meeting, use the bathroom, or any of the other day-to-day activities that make up a typical work day. Since it is impossible to eliminate these activities, it is necessary to accommodate them by having a "shrink factor." The shrink factor is the numerical factor that leads to the minimum staff needed after the base staff, or RSF, has been determined. Someone has to cover the phones when analysts are at lunch, in meetings, attending training, etc. Of course, many organizations ignore this aspect of staffing a support department and permit a reduction of service and an increase in response time, to the detriment of customers. As an executive, you and your support manager have

to make a decision as to whether this approach is acceptable or not. If you consider it okay to keep your customers waiting, consider adding a telephone call queue announcement that says, "…please continue to hold. Your call is important to us but we don't have enough people available right now, so please wait and listen to our commercial or excuse until we get to you. Thank you." This approach is not recommended if you want to keep your customers happy and make them feel valued.

Utilization Rate

Utilization is of primary importance in maximizing productivity and employee morale. If the support center staff is too busy, they will be stressed to the point that they make more mistakes, lower customer service ratings due to bad tempers, and change jobs more quickly. Conversely, if they are not busy enough, they will be bored and be a drain on the organization's budget. Either situation results in costs that are too high for the services that are being provided. The support cadre has to be taught to appreciate the relationship between service level objectives and individual contribution and performance. Employees have to be motivated to take calls and be evaluated on their contributions. They must also have opportunities for job challenges, variety, and career paths that can be achieved. The target utilization rates built into the staffing models should allow for an effective balance of on- and off-phone time.

Several decades of studies have shown that agents with a Phone-in-Ear (PIE) greater than 5.5 hours will result in high turnover/burnout rate. A support center utilization rate in the range of 65 to 75 percent for an on-phone/available time is typically the maximum for most successful support centers. The balance of time at the workplace should be devoted to training, development, and special projects.

Capacity Model Method[2]

The capacity model takes into account the Gross Staffing Model that was presented earlier, but it expands the degree of sophistication by examining the products that the support center supports, and the number and importance of customers that the support center has. It allows for the definition of a theoretical model that reveals how many staff are needed. The elements of the capacity model are as follows:

- **The Number of Incoming Calls and/or the Number of Customers.** There is a fairly constant correlation between the two.

- **The Diversity of Calls**. All things being equal, more staff will be needed if the support center supports more products, more versions of the products, or complex products.

- **Recent Products or Version Releases.** All support centers experience an increase in calls following the release of a new product, tool, or version of a product. Predictions to the contrary from other departments while sincere, are inevitably incorrect. At the very least, customers will need installation assistance. New releases will also create new questions from experienced, and often, exasperated users.

- **The Difficulty of Calls.** The more difficult the calls, the more staff will be needed. The most accurate indicator of call difficulty is the work time or handle time (Talk Time + Wrap-up Time).

[2] Adapted from The Art of Software Support, Francoise Tourniaire and Richard Farrell, Upper Saddle River: Prentice-Hall, 1998, Page 163-165, Page 301-302

The outcome of the capacity model is the relationship between the customer base and the staffing requirement. A basic model describes how many customers can be supported by one engineer and would be presented as: "Each customer places three calls per year. On the average, each call takes 21 minutes of talk time to solve. Support analysts are available (per the Gross Staffing Model) six hours per day. Therefore, one analyst can resolve 17 calls per day, which is equivalent to supporting 1,473 customers. You will need one analyst for each set of 1,473 customers.

When using the Capacity Model for scheduling purposes, you will need a more robust model that goes beyond figuring workload. Telephone calls arrive in random patterns, so it will be necessary to have slightly MORE staff to handle the work. Software that uses Erlang C computations can be an invaluable asset in determining the best possible staffing level.

A.K. Erlang was a Danish mathematician that developed a set of traffic engineering techniques to determine numbers of facilities required in various telecommunications scenarios in the 1900's. The Erlang C formula describes situations in which a limited number of analysts are handling an unlimited number of requests, and shows how the requests will be queued or NOT handled immediately. This situation is expressed by the "Average Delay of Delayed Calls" or ADDC. ADDC captures the average length of time the calls that cannot be handled right away have to wait, or the "Average Hold Time." The other metric involved is the "Average Speed of Answer" or ASA. The ASA is the average wait in a call queue that will be experienced by all callers to a queue during a specified period. It includes both calls delayed and those answered immediately in the calculation.

There are dozens of staffing calculation software programs that can automate the calculations needed to determine the number of analysts needed, depending upon the desired ADDC and the ASA.

There are even free basic programs available on the Internet; the important principal to remember is that determining the staffing level is not a matter of the support manager saying, "We need more people." Using the models discussed above, it is possible to make reasoned judgments that are based on data and basic modeling techniques to determine a support center staffing level.

Headcount Strategies

Critical to maintaining a successful staffing level is monitoring the support center's Rostered Staff Factor and Shrink Factor. Calculating these numbers once a year will NOT give the support center manager the ability to report to management the trends affecting the center. Staffing calculations should be performed once a month and quarterly, and reviewed to determine if any trends have developed that require an increase in the support center's staffing level. If a gap between existing staff and needed staff appears, it is incumbent upon the support center's manager to lobby for increased staff to deal with the growing workload. Failure to take this action will result in angry and frustrated customers and a staff that will burnout and change jobs.

Chapter 3

The Dynamics of Telephone Callers

I once had an executive client that insisted that any abandoned call was unacceptable; he considered such calls a failure of customer service. The reality is that even the most perfect support center will have callers abandon. The question to ask is, "When do they abandon?" If they abandon in 20-30 seconds, it is an indication that they were not serious about contacting the support center. If callers are abandoning after 90 seconds to X number of minutes, then a problem has been identified. This situation indicates that the caller was serious about contacting the support center, but finally grew impatient with the wait; that's a problem. The support center manager must be able to identify where the most abandoned calls happen and when they happen. If a trend is spotted, then action should be taken to correct the problem.

Another consideration that should be kept in mind is the characteristics of callers. These characteristics are called "The Seven Factors of Caller Tolerance."[3]

They influence everything from how long callers will wait in queue to how many will abandon, how many will retry when they get busy signals, and how they will react to automation such as a voice response unit (VRU). They also affect how callers perceive the service the call center is providing.

[3] Call Center Management On Fast Forward, Brad Cleveland and Julia Mayben, Annapolis: Call Center University Press, 1997, Page 18-20.

- **Degree of Motivation.** How motivated are your callers? Callers experiencing a power outage will usually wait longer to reach their utility than those with billing questions.

- **Availability of Substitutes.** Are there substitutes the caller can use if they can't get through to the initial number they are trying? If they are highly motivated and have no substitutes, they will retry many times if they get busy signals and will generally wait a long time in queue if necessary. But if they know of an alternative number to try, or if there are other selections in your automated attendant ("press one for this, two for that"), they may try those alternatives. Or they may try fax, Web or VRU-based services. They may even walk down the street if you have a retail outlet.

- **Competition's Service Level.** If it's easier for callers to use competitive services or if they have a tough time reaching you, they may go elsewhere.

- **Level of Expectations.** An organization or industry's reputation for service—or the level of service being promoted—has a bearing on caller tolerance.

- **Time Available.** For example, a caller's occupation can affect caller tolerance. Doctors who call insurance providers are infamous for being intolerant of even modest queues. Retirees, on the other hand, may have more time to wait.

- **Who's paying for the call?** In general, callers are more tolerant of a queue when toll-free service is available. They are intolerant of even short waits when they are paying for premium priced numbers (e.g., 900 service).

- **Human Behavior.** The weather, the caller's mood, and the time of the day all have a bearing on caller tolerance.

The seven factors are not static. They are constantly changing. Even so, it is important to have a general understanding of the factors affecting your caller's tolerance. Important questions to consider include:

- How motivated are your callers?
- What type of caller is least motivated? Why?
- What type of caller is most motivated? Why?
- What substitutes to calling you do they have?
- Which substitutes would you want them to use?
- Which substitutes would you not want them to use?
- What are their expectations?
- What level of service are others in the industry providing?
- Who pays the bills?
- How might your caller's lifestyles influence their tolerance?
- All things considered, how high is their tolerance level?

Nine Things Senior Management Should Understand About Support Centers and Incoming Calls [4]

1. **Calls bunch up from time-to-time.** Telephone calls arrive randomly and have peaks and valleys. Planning for a workload that arrives randomly makes support centers different from other departments in an organization. Customers (callers) decide when they want to call, and despite some general patterns, support analysts have to respond when the customers need them. Staffing and productivity tasks have to be considered in this context.

2. **There is a direct link between resources and results.** Certain levels of resources are required to reach a specified level of work. If it takes 36 first level analysts to achieve a service level of 90 percent with an ASA of 20 seconds for a given call load, then that is what is required to staff the support center.

[4] Adapted from Call Center Management On Fast Forward, Brad Cleveland and Julia Mayben, Annapolis, Maryland: ICMI Press, 1997, Pages 146-148

Incremental improvements can be achieved with training, good organization, and excellent leadership, but they cannot achieve long-term, long-lasting productivity improvements. In this case, doing more with less is counter-productive.

3. **"Staffing on the cheap" is expensive.** If analysts are so busy that they cannot routinely leave their phones, they will burnout and leave for other jobs. In addition, average handling time will increase as analysts find ways to take fewer calls out of exhaustion. Customers will complain about long wait times and customer satisfaction will suffer.

4. **Service level has no industry standard.** There is no one service level that is applicable to every support organization. Each organization places different values on customer service, and each will have different staffing costs, network costs, and numbers and types of callers. Determine a service level that makes sense for your organization according to your caller's needs, your objectives, and your cost structure.

5. **When service level improves, productivity declines.** Although it may appear counter-intuitive, there is logic to this phenomenon. The higher the service level, the longer the analysts are in their seats taking calls. At a certain point, fatigue sets in and productivity declines; tired people make mistakes and look for ways to lighten their workloads.

6. **You will need to schedule more staff than the base staff required.** Unless every single analyst has absolutely no other job responsibilities, never goes to lunch, training, the restroom, or goes on vacation or becomes ill, then the support center will need more people than is indicated in the results of staffing calculations. It is important to recognize that schedules should realistically reflect the tasks that can keep analysts from taking calls.

7. **Purchase the best hardware and software possible.** Hardware and software make up less than 15 percent of a support center's budget over the long term. Telecommunications hardware and software, problem-tracking software, knowledge base software, headsets and amplifiers, and training equipment are critical tools for a support center and it makes sense to buy tools and systems that provide the "biggest bang for the buck."

8. **Telecomm and IT people should provide service and support to the support center.** Support centers do use a great deal of technology, but they are customer-facing operations, not technology operations. These systems should be managed from within to maximize their use in supporting customers with the support of Telecomm and IT departments.

9. **Summary ACD reports don't tell the entire story.** Interpret ACD reports for what they are worth; they provide one snapshot of the activity in a support center and need to be considered in the context of the overall operation of a support operation. Only a Balanced Scorecard can provide the comprehensive information needed to convey the details of a support operation.

How to Annoy Your Customers with Technology

The simplest way to annoy your customers with technology is to build a wall or a moat around the support center and the organization. Anyone that has become lost in a long telephone menu understands the concept. The "digital moat" is a thoughtless and frustrating device created by organizations that accidentally, and sometimes consciously, do not want their analysts speaking to their customers because of the cost and other resources required. There is nothing wrong with marketing alternative contact methods to one's customers, but if the only marketing tool is a long wait time on the telephone, then it is likely that more harm then good is being done to the customer's perception of the organization's service and support.

Chapter 4

The Support Center Metrics Program

Support center metrics are to technical support, what human vital signs are to doctors and nurses. They are indicators of health, performance, profitability, and job security. When used correctly, creatively, and continuously, they can make the difference between a satisfied and loyal customer base and an organization that is serving angry, resentful customers, staffed by sullen, exhausted employees.

Support Metrics 101

Measurement in a support center has certain rules that must be understood in order to use metrics successfully. "Measurements will show you things that must be fixed, things that are going well, and even make you think things are happening that may not be the case."[5] The rules are as follows:

- **Only measure what you will act on**. If metrics aren't tied to an organizational goal and aren't used to serve customers and employees, then they are a waste of time and resources. Metrics must be action-oriented.

- **Measurements are only ONE thing to base your actions on.** A metric is just a number unless it is validated, analyzed, and tied to a higher organizational purpose. Examining charts, graphs, and tables is fine, but it is what happens after the analysis is completed that makes a difference in an organization.

[5] Building & Managing a World Class IT Help Desk, New York: Osborne/McGraw-Hill, 2001, Page 334.

- **Measurements drive behavior.** The old saying, "You get what you measure," is as true today, as it was when the phrase was coined. For example, if the emphasis in a support center is on taking as many calls as possible, then the majority of the analyst's assigned to take telephone calls will find ways to meet that instruction, even if it means ending the call prematurely and against the customer's wishes.

- **Always report your findings.** This rule is simple, report everything. If there is bad news in a report, figure out why it is happening as well as a solution to the problem that has been identified. Don't hide, obfuscate, or deny that any measure is not what it really is. If it is necessary, and it usually is, educate the audience using the metrics report. It is never advisable to try to "baffle them with bull s**t."

- **Report findings in ways that the audience can understand and appreciate.** If the CIO can't understand a report, then it is in a format that is useless. The senior consumer of the report deserves the information in a format that is comfortable for them. Determining what that format is, is as simple as asking them. It is the wise support manager that will take the time to find out what this format is and accommodate this internal customer.

Basic Support Center Metrics

Each metric has a number of Key Performance Indicators (KPIs) that will be used to monitor the support center's performance. The KPI information is drawn from the ACD (Automatic Call Distributor), PBX (Public Branch Exchange), problem management and call-tracking systems, network monitoring systems, e-mail management systems, and knowledge management systems.

The most common metrics are:

- **Average Speed of Answer (ASA):** Reported in seconds, this is the average amount of time that a caller waits in a queue before the call is answered. This is used to evaluate and adjust staffing levels. The formula is:

[Total Time in Queue] in seconds/[Total Inbound Calls]

- **Abandon(ment) Rate (ABA):** This is the percentage of customers that terminate a call before the call is answered by an analyst and is used to evaluate and adjust staffing levels. Typically, if the ASA is too long the ABA is likely to increase. To arrive at the ABA percentage, the formula is:

([Total Abandoned Calls] / [Calls Inbound]) * 100

- **Average Talk Time:** This is the average time spent talking to a customer and is used to evaluate and adjust staffing and training needs. The formula is:

[Total Talk Time] / [Total Inbound Calls]

- **Call Wrap-up Time:** This is the time spent finishing documentation for a call center after the call has been terminated. The ACD reports this activity.

- **Analyst Availability:** This is the percentage of total time the analyst was available to take incoming calls, or make outgoing calls. Used to measure productivity of the support center and staff, the formula is:

[Total Talk Time] / [Total Work Time]

- **First Contact Resolution: (aka First Call Resolution):** The percentage of calls resolved on the initial contact with the customer is used to measure the knowledge level of the HDAs (help desk analysts), and to measure the complexity of calls relative to the HDA's knowledge level. The formula is:

[Total Calls Resolved During Initial Call] / [Total Inbound Calls]

- **Cost per Call:** This is the average cost per call for the support center.

[Total Support Center Costs] / [Total Number of Calls]

- **Cost per Ticket:** This is the average cost per ticket for the support center.

[Total Support Center Costs] / [Total Number of Tickets]

Leveraging Performance Metrics

Once the metrics and Key Performance Indicators are in place, they can be used in a number of ways:

- **Training:** Often the top 10 incidents require 80 percent of a support center cadre's time. This provides training opportunities for analysts, organizations, and customers.

- **Trend Analysis:** This is used to identify areas that might be candidates for enhanced or improved service. For instance, if the support center's peak call hours are 8-10 A.M., it is advisable to schedule more staff during these hours (perhaps staggered scheduling of third and first shifts).

- **Root Cause Analysis:** This is used to identify a root cause to permanently eliminate a problem or a host of problems.

For example, if your tracking system shows that there have been an inordinate number of printer problems in a specific department, it may be a good idea to perform a Root Cause Analysis to determine whether this is just a symptom of a larger problem. Effective use of Root Cause Analysis can result in reduced calls for a particular category of incidents whose root cause has been identified and eliminated.

- **Performance Evaluations:** These are used to measure the performance of the team as a whole, as well as the performance of individuals on the team. Comparing each team member's individual statistics to the target goal of each metric lays the groundwork for conducting performance evaluations.

- **Metrics and Models:** To build a complete picture of your support operation, you must choose a variety of different metrics that reveal all vital aspects of your operation. The following case study shows how a few metrics can build models to help you analyze your performance, make business decisions, or forecast the effects of change.

Case Study

A global manufacturer of consumer fast foods and beverages wanted to standardize its metrics to evaluate performance across five divisional help desks. The company also hoped to obtain information on which to base a decision about consolidating two or more of these help desks.

The company developed a model using recent data from two of the five help desks. The chart on the following page shows sample data from one help desk.

Sample Help Desk Data

Metric	Third Quarter	Fourth Quarter	First Quarter First Month	First Quarter Goals
Number of FTEs	9.2	8.5	10.0	15.0
Avg Speed of Answer (ASA) in seconds	70	57	13	3
Incidents closed in 1hour	46%	45%	65%	X
Abandon Rate	18.9%	18.8%	3.7%	X
Customer Satisfaction Rating	X	X	8.7	8.8-8.9
Cost per User	$46.00	$42.50	$15.38	$75.00
Cost per Event	$19.22	$18.62	$18.52	$27.77

The data indicate that this company clearly has a problem with its ASA. The starting measurement of 70 seconds is far above the industry average of 12 to 15 seconds. Focusing on the problem allowed them to lower their ASA by 13 seconds between the third and fourth quarters. With the increase of 1.5 FTEs in the first month of the new year, they were able to further improve the ASA to an acceptable 13 seconds. At the same time, the rate of incidents closed within one hour increased by about 20 percent, indicating better solutions as well as a better ASA. However, the first-quarter goal of further reducing the ASA to three seconds by adding personnel drove their cost per user and cost per event above an acceptable level. Even more important, this 40 percent cost increase produced only a small change in their overall customer satisfaction ratings. The support center manager had clearly confused the ASA metric with the overall customer satisfaction goal.

The detailed cost and service quality data provided by this model gave the company a much better understanding of how changes in cost/workload metrics affected its goals. With this information, the company could retarget its goals to providing service focused on the *quality* of the solution in ways that would avoid increasing

direct labor costs. It could then extend the more efficient model to the help desks in other divisions.[6]

The Balanced Scorecard Service Model

The Balanced Scorecard Service Model is an adaptation of the work of Robert S. Kaplan of Harvard University and David P. Norton of Renaissance Solutions. They argue that the traditional reliance upon quarterly financial reports, while important, is a model based on accounting principles that were not developed with today's modern corporation and support center. The Balanced Scorecard complements financial measurements of past performance with measures of the drivers of future performance. The objectives and measures of the Scorecard are derived from an organization's vision and strategy. The objectives and measures view organizational performance from four perspectives: Financial, Customer, Internal Business Processes, and Learning and Growth.

Ron Muns of HDI and Mark Ellis of Kronos, adapted Kaplan and Norton's model to the support center in the excerpt on the following pages:

Most of this book focuses on processes based on ITIL®; however, it also covers other important processes for support centers that are not covered by ITIL®. Mark and I have documented an operational Service Model that balances key performance metrics that often conflict with one another. For example, customer needs at times, seem to be at odds with costs/productivity goals. While both are important, they can compete for your attention.

[6] Adapted from Using Service Goals and Metrics to Improve Help Desk Performance, Mark W. Ellis, Colorado Springs: The Help Desk Institute, 1997, Page 23-24

Support Center BSC Service Model

Effective financial and operational management for any support center operation should be directly linked to an integrated Balanced Scorecard Service Model that focuses on customer satisfaction, employee satisfaction, costs/productivity, and organizational maturity. Utilizing these four elements to form a high-level goal set with supporting Key Performance Indicators (KPIs), also known as key business indicators or operational metrics, will not only allow a support center manager to look at past performance and trends, but also will allow for optimized forecasting of future costs, operational performance, and service levels based on workload for the projected base of customers, whether internal or external.

First Quarter 2005 Balanced Scorecard

Customer Satisfaction Goals: 100% Supporting KPIs -Customer Sat. Survey Results: 95% -ASA: -FCRR %: -% SR Reopened: -SR Escalated: -Contract Renewal Rate: -% Performance Against SLA:	**Employee Satisfaction Goals: 100%** Supporting KPIs -Employee Sat. Results: 53% -Absenteeism Rate: 85% -# of Turnovers: -#Internal Turnovers: -# of Requests for Transfer: -Average Training Hours per FTE:
Cost/Productivity Goal: <$5.00 per Contact Channel Supporting KPIs -Cost per Call: $14.91 -Cost per Email: $10.06 -Cost per IRC: $3.73 -Cost per Walk-to: $5.53	**Organizational Maturity Goals: Meet all objectives within time period objectives** Supporting KPIs -Period to Proficiency: 150 days **(90 days)** -Formalization of IT Processes: 5 **(1-10)** -Time to Fill Knowledge Gaps: 10 days **(5 days)** -Quality Issues Resolved: 1/Month **(3/Month)**

Customer Satisfaction

Customer satisfaction is generally measured via customer surveys. To minimize bias, an external firm should ideally conduct these surveys. External survey firms may also offer comparative industry data or provide additional analytics on survey results. When this is not possible, efforts should be made to assure survey participants of the value of their honest responses.

The primary customer satisfaction survey is transaction based, which involves utilizing an abbreviated set of questions based on

closed incidents (phone, e-mail, or Web). These surveys are usually focused on a limited number of questions specific to an incident during a given period, and specifically target the person who generated the original incident. Standard sample questions might include:

- Please rate the accuracy of the solution provided.
- Please rate the timeliness of the solution provided.
- Please rate our initial responsiveness to your incident.
- Please rate the professionalism of the support engineer who answered your incident.
- Please rate your overall experience for this incident.

Other indicators of customer satisfaction might include repeat usage of support center services (mostly applies to external support organizations) and percentage of customers participating in surveys. If customers don't think their input matters, they won't respond.

Employee Satisfaction

In any service business, the people who deliver that service are the essential product. Despite this, many service organizations, including both internal and external support centers, do not properly manage and maintain their employees' general job satisfaction. This can impact both customer satisfaction as well as the cost of operations.

An employee survey should be conducted twice a year with each employee, ideally about six months apart. Regular surveys will allow comparison of results and will identify improvement and/or dissatisfaction over time.

Finally, companies that effectively manage employee satisfaction do not always have the highest pay scales for their area. Pay rates are often ranked as the third or fourth most important issue on

employee surveys. Generally, communication and training will frequently be more of an issue. Well-managed customer support centers that can integrate employee needs into an effective service delivery model will become a target employer of future employees.

Costs/Productivity Goals

It is time for the industry to come together and agree on definitions and methods for developing cost metrics. This is the only way that benchmark comparisons can have any value. Standard costing (and operational) metrics will allow support organizations to understand their cost structures and operational efficiencies in comparison to other organizations or within the organization itself. It will help you understand and answer questions, such as:

- Are we spending too little on support infrastructure and too much on labor?
- Are our costs for e-mail support to high?
- How much could we save by moving our end-users from phone support to self-help?
- Are our costs high because we have excessive overhead allocations?
- When can we expect to get a return from the introduction of new support tools?
- We do level 1, level 2, and level 3 support and thus our cost per incident is higher than our competitors. Does management understand that our competitors support costs only include level 1 support? Or, does management understand that the competitor's support organization only provides log and route support?

Doing costs/productivity analysis on the support organization eventually boils down to calculating costs in terms of cost per unit of work and per service delivered (i.e., per incident). The most important unit is the cost per incident, which should be computed

separately by channel received (phone, self-help, chat, e-mail, self-healing, etc.). This analysis may be further broken down by products or services offered.

Organizational Maturity

Of the four quadrants; customer, employee, costs/productivity, and organizational maturity, this last one is the most strategic and the most subjective. It is focused on the structure, ability to change, quickness, responsiveness, and strategic positioning of support within the larger organization. Organizational maturity enables customer and employee satisfaction with optimal cost structure. Elements to track that indicate organizational maturity include:

1. Visible executive support of the support center.

2. Time to fill knowledge gaps—When new errors are identified, how long does it take to document the problem and the solution? How long does it take for this information to be available to the support analysts and end-users (customers)?

3. Time to Employee Proficiency—How long does it take for new employees to be productive?

4. Time to New Product Proficiency—How long does it take for the support organization to be proficient on new products?

5. Flexibility of cost to changes in workload—How quickly can the support organization change the cost structure (up or down) as work varies?

6. Diversity—Has the organization embraced the value of racial and cultural diversity within support? If the organization has global team members, are they aware of cultural and local issues that vary the definition of best practices?

7. Work elimination through problem management and change management—Tracking of cost savings resulting from identification and elimination known errors.

8. Formalization of IT processes—Tracking indicators that the support organization has integrated all support processes with those of other IT functional areas.

Conclusion

The key to the BSC Service Model is to continually improve in all four quadrants. It is easy to improve customer satisfaction if you don't consider costs. It is easy to lower costs if you don't care about employee or customer satisfaction. It is easy to mature as an organization if you don't focus on anything else. The key is in the balance. The ying and the yang of the support center. As with life, it is about balance. By understanding how our management decisions affect our customers, our employees, costs, and our future, we can evolve into that wonderful, but elusive "world class" support center. Best of luck! [7]

[7] "The Support Center's Balanced Scorecard Service Model," Ron Muns and Mark Ellis, The Muns Report, HDI, December 8, 2004.

Appendix 1

Maturity Model for the Support Industry

White Paper: *Developed by HDI's Strategic Advisory Board 2003*

HDI practitioner members have recently expressed an interest in having a guideline that allows them to measure how their support organizations are maturing as compared to where they should be. Are they performing better or worse than their peers? How are they progressing in the "normal" evolution of support? What technologies, people strategies, and processes should they have in place? Is their vision broad enough? Support managers want to know how mature their support organizations are in relation to cost, performance, and quality.

Similarly, HDI vendor members have expressed the need to know if their product and service offerings are helping their customers evolve or mature. What is expected of their product? What can they change to help their customers mature their support function?

HDI's Strategic Advisory Board met this year to develop a maturity model for support organizations and to answer these questions and needs. Developing a "normal" or "typical" support organization maturity model must consider variations in organizational development. We know that organizations evolve and mature in different ways based on the priorities and needs of the organizations supported. We offer our thanks to the HDI Advisory Board members who shared their time, expertise, and opinions to form the basis of the HDI Support Organization Maturity Model.

The HDI Support Organization Maturity Model represents the progression of the typical internal IT support organization (and most external support organizations) from being highly tactical and reactive to being "strategic," defined by HDI as closely aligned with the overall business' objectives and value propositions.

[We believe there are exceptions to the maturity model, such as the appliance repair call center (generally viewed as reactive or the lowest level and always will be). However, while appliance company X, is reactive in the manner it functions (dispatch-oriented), it is "mature" in the sense that HDI defines it, because it is addressing the overall need of the business. We believe the maturity model outlined below will provide an excellent roadmap for support organizations to follow to reach maturity.]

Objectives and Use for this White Paper

We hope that this white paper will help support management and their teams develop a vision for the future. By understanding the characteristics associated with each maturity level and comparing it to their current situations, organizations can develop new and better strategies.

As organizations evolve to higher levels, there are expenditures of time and money that are required. Management often asks for and deserves to receive an explanation of the return on investment (ROI) for each evolutionary step. We believe this is a valid request, but we also believe that recognizing the overall vision of the support organization is equally as important. By providing clarity to the value proposition of various support models, we hope to assist support managers in gaining corporate support to take their organizations to higher levels of support maturity.

HDI's Support Organization Maturity Model will help support management and their teams move from a primarily tactical organization to one that provides strategic business value. It also

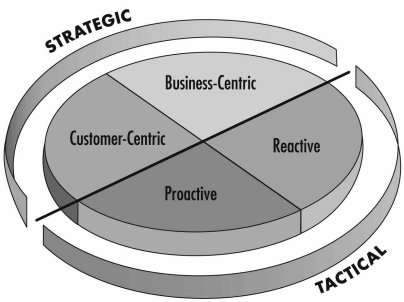
provides a visionary roadmap to help define goals for the future. We are hopeful that corporate management will gain an understanding of the current status of their support organizations compared to their potential maturity level. With greater understanding by all parties, HDI hopes that its member organizations will be able to obtain needed budget dollars for technology investments, ongoing professional training, individual and support center certification, clear career path development, and other tools that will enable them to continue on the path to maturity.

The Maturation of Support—From Tactical to Strategic

HDI has defined four levels of support organization maturity, from highly tactical to highly strategic. They are:

1. Reactive
2. Proactive
3. Customer-Centric
4. Business-Centric

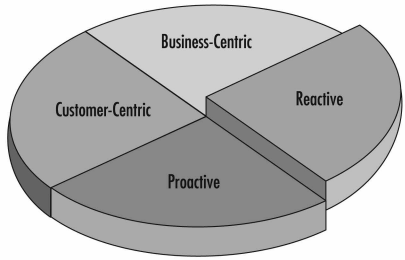
Support Model Evolution



On the following pages we will define the four levels of support maturity and the value proposition associated with each. The commentary for each level of maturity will be best understood by understanding the characteristics associated with each level.

Each maturity level can be seen as a recognizable stage in the support center's evolution and is defined by characteristics that provide incremental value. We understand that no two organizations mature in the exact same way, and as such, you may find your support organization to be in several maturity phases at once.

Level 1 – Reactive



Characteristics:

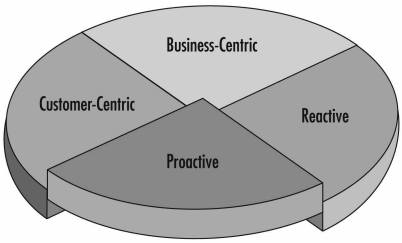
- Labor driven
- Hours 8 A.M. – 5 P.M.
- Can be chaotic
- Dispatch-focused
- Generalists
- Simple telephony
- Little measurement

Definition: Reactive support organizations are highly labor-driven. They may not have been in existence very long, and are not likely to be "open" for as many hours/days as their customers would prefer. New support organizations are commonly only open during standard business hours (8 A.M. – 5 P.M.). Such an early stage support organization probably has not developed "tiers" of support within the support organization and, as such, "generalists" are taking all calls. As a result, the first call resolution rate is low and the percent of incidents that have to be "dispatched" or "assigned"

to other departments is high. Generally, the organizations support simple telephony and the work environment can be rather chaotic.

Value Proposition: The support function is beginning to form and customers have someone to call. While the service may not be sophisticated and the cost per call may be high, at least the organization has recognized the value of building a support organization, and may see a return on customer satisfaction and loyalty.

Level 2 – Proactive



Characteristics:

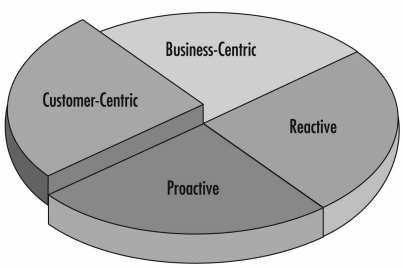
- Call tracking
- Extended hours
- Best practices
- SLAs
- Knowledge systems
- Self-help
- Customer Surveys
- Asset management
- Support center metrics

Definition: After an organization has been in existence for some time, it becomes more proactive than reactive. The chaos of being reactive can be overwhelming for support organizations, and they

are often driven to be more proactive just to survive. Proactive organizations implement needed support technologies, such as incident tracking systems and work towards the implementation of best practices for their support processes. They have extended their support hours to meet the needs of a mobile and flexible workforce. Proactive organizations have their staff involved in professional communities (i.e., HDI and HDI's Local Chapters). They have developed Service Level Agreements with other departments that provide level 2 or level 3 support. They understand that by building a knowledge base of frequently reported incidents for their customers or analysts to see, they can improve service and lower costs. They do not wait for customers to complain; rather they conduct regular surveys and encourage customer feedback. They likely have good information on their technology assets as to location and version number, and may have implemented automated software distribution tools. While they may not have complete support center performance reports, they have begun to track and report a number of key support center metrics.

Value Proposition: The Proactive Support Center provides a significant advance in value over the Reactive organization, as it is much more efficient and effective in anticipating and addressing the needs of its customers. Support at this level is a respected function; many of the necessary tools are in place, and great strides have been taken to implement best practices. At this level the support center has a good understanding of the types of incidents that are being reported, but may not be able to provide sophisticated or comprehensive feedback to the development group(s), procurement, or the business unit heads that they serve.

Level 3 – Customer-Centric



Characteristics:

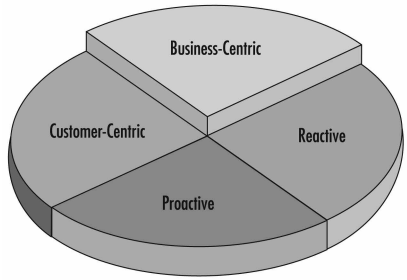
- Quality-focused
- SPOC
- SLAs
- 24x7 operations
- Multi-channel support
- Self-service
- Workload planning
- Costing/chargeback
- Partner with customers and vendors
- Measures support performance

Definition: The Customer-Centric support organization is totally focused on meeting the needs of the customer. It consistently provides them with service when and how they want it. The Customer-Centric support organization has developed a single point of contact (SPOC) for all customer interactions and documents all customer interaction for quality analysis, backed by product and service improvements. Proper staff planning maximizes the chance for the right resources to be available, when and where needed. Customers can report incidents via phone, e-mail, chat, or other channels as they so desire. The support organization understands the cost of services by incident type, customer group, and channel of support, which allows the

customer to better understand their cost or actual invoices, specifically if chargeback is involved. Customer-Centric support organizations consider vendors to be their partners, and have dropped terms such as "we" and "they." Overall support center performance metrics are in-depth and broadly communicated.

Value Proposition: Customer-Centric support is an excellent level to perform at and one in which many support centers are still seeking to achieve. The customer is king and the entire support team has one objective—satisfying the customer. Such organizations are models of excellence and often represent models that others would like to emulate. By proving a variety of ways for customers to obtain support, and creating a valuable partnership with the customers it serves, the Customer-Centric support center allows the entire organization to operate more efficiently and effectively.

Level 4 – Business-Centric



Characteristics:

- Vision alignment
- Value integration
- "Seat at the table"
- Fully automated
- Measures IT to business KPI-s

Definition: The Business-Centric organization knows the value of the customer, but understands that the customer values and priorities must be integrated with support values in order to meet the higher needs of the entire organization. At this highest stage of support maturity, the support team has a collegial relationship with its key constituencies or key contacts within the customer groups they serve. Support leaders understand the business of the customers they serve and how support impacts organizational productivity. Likewise, the business units served have an understanding of the costs and benefits of various support options and how they can work with support to improve overall organizational productivity. The support organization provides performance reports that detail how support impacts organizational performance. The support function is fully automated and support tools are integrated.

Value Proposition: The Business-Centric organization has developed the optimal method for evaluating support in terms of its overall value to the organization. The costs and benefits of support are understood in order to maximize the productivity across the organization.

Conclusion

HDI has created its Support Organization Maturity Model to serve as a tool for comparing one's support organization to a set standard in order to better measure its effectiveness and its value, while providing a roadmap to move organizations from one level to the next.

Of course, not all organizations will have exactly the same characteristics, but it is HDI's hope that this model will serve as a guidebook for continuous evolution, improvement and valuation of the support center and its vital role within the overall organization.

102 South Tejon Street, Suite 1200 ▮ Colorado Springs, CO 80903 USA
U.S. and Canada: (800) 248-5667
www.ThinkHDI.com