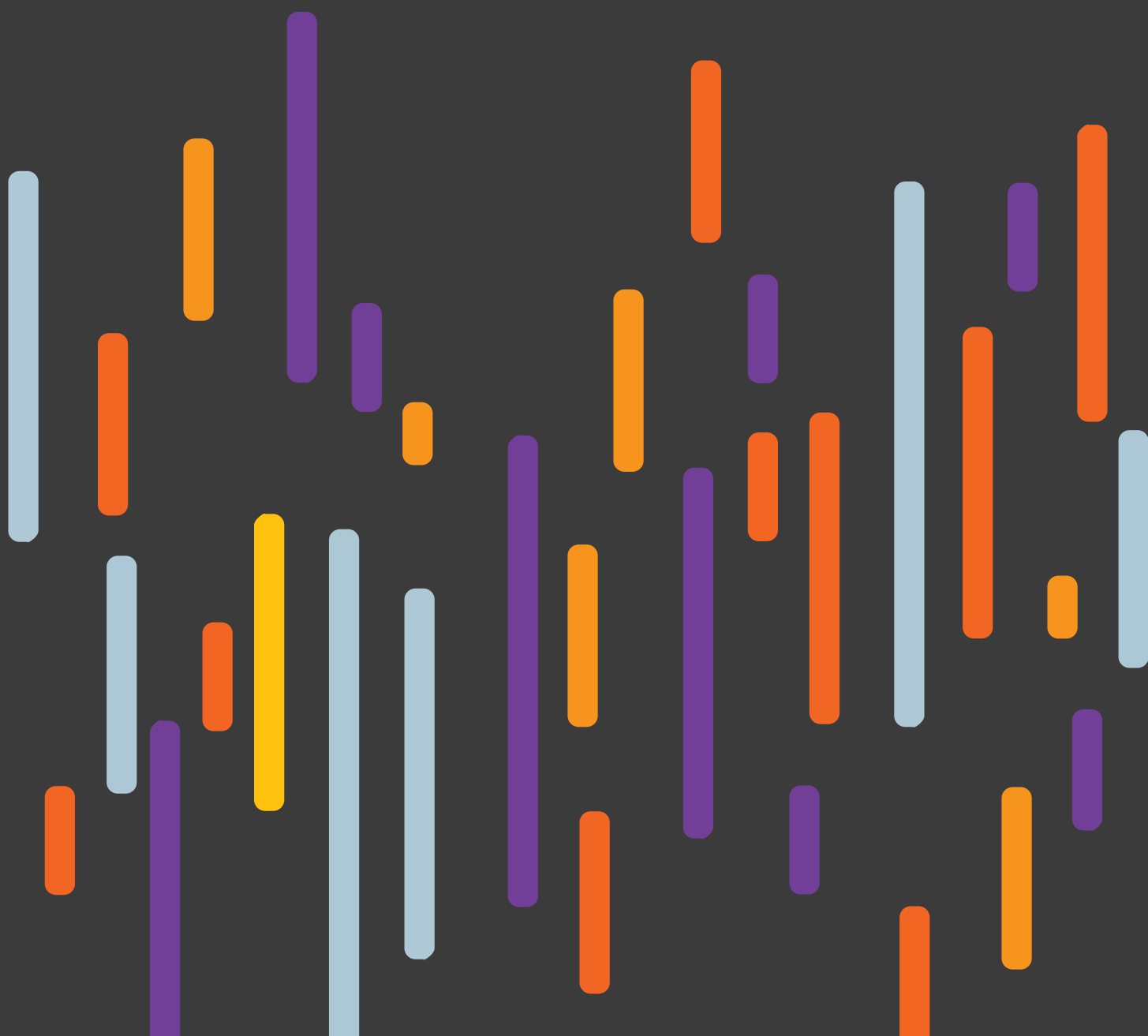




# How to build actionable help desk reports and metrics?

*Focus on "Why you measure" instead of "What you measure"*



Before you make a decision on a tool to measure your help desk performance it is important to understand what data is required for your team to perform their day-to-day activities with clarity and focus on their goals. Many help desk analytical tools offer metrics that are not only generic but also does not help your team comprehend why they measure what is being measured.

If you are looking to help your stakeholders break away this dilemma and stay relevant with trends and anomalies in your support operations you need to approach this problem contextually.

From our experience in helping organizations and business units succeed with customer support and engagement we have come up three personas who will constantly need to appraise themselves with relevant help desk data. This is essential for them to plan and pivot their personal and organizational behavior towards achieving successful customer relationship.

***Here is how rightly built help desk metrics can help every individual concerned***

<b>SUPPORT STAFF</b>	<b>SUPPORT MANAGER</b>	<b>EXECUTIVE</b>
Assist Execution	Assist day-to-day Operations	Assist Strategic decisions
Manage tickets effectively	Monitor and measure individual performance	Assess goals related to organizational growth
Handles Ticket level information	Handles Staff level information (Mostly)	Handles Team , Product and customer level information
Makes decisions related to efficient and effective ticket handling	Makes decisions related to effective execution as per a strategic plan	Makes decisions related to investment & strategic customers on long term basis

# Metrics that help you solve customer issues

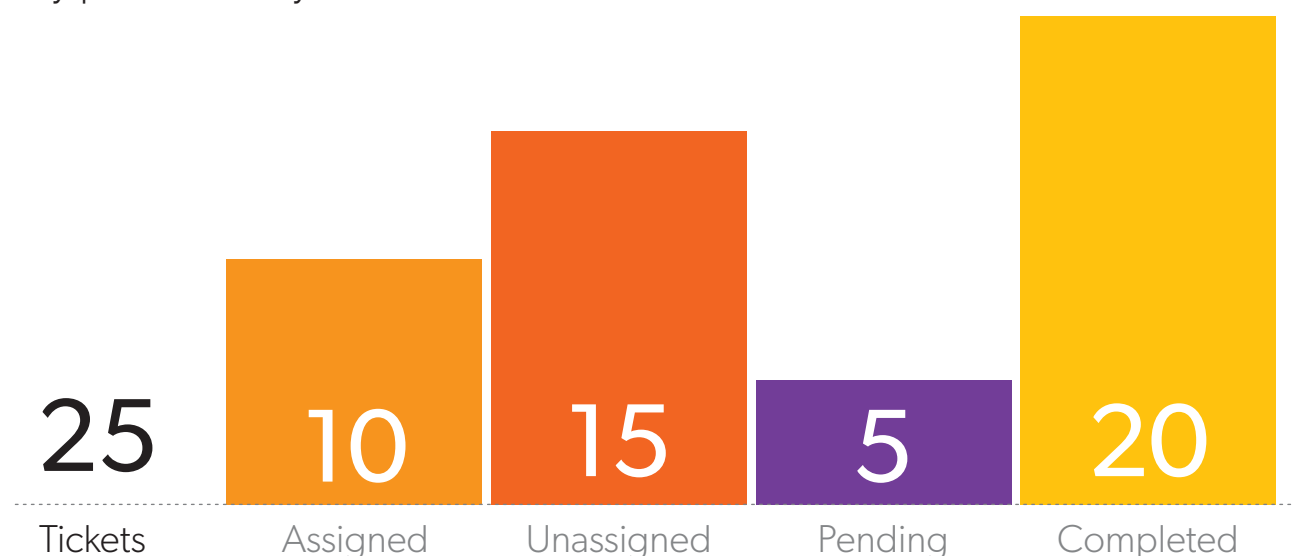
## for Support Staff

As support staff, staying focused on day-to-day help desk activities is key to driving short-term support goals, be it improving customer satisfaction score or driving engagement to inspire a prospect to turn into a customer. From your support analytics perspective here is what is essential to keep support staff informed and on-track to achieve their goals:

1. Address tickets pending a reply
2. Escalate tickets requiring L2 support or subject matter experts to intervene
3. Address tickets due on that particular day, plan for near future
4. Make sure you meet your customer's expectations from your company
5. Measure and improve upon customer satisfaction

### **Open tickets that require your attention**

Depending upon your organization processes either you would proactively pick the new and open tickets or have your manager or team lead assign tickets to you. In any case it is important for you to have a single source of truth where you get to know how many tickets are waiting for your attention any particular day or time.



At the same time it is also essential to understand which of those tickets in your bucket require L2 or L3 intervention.

### L2 Escalations

Subject	Assigned to
Scheduling a live demo on the reporting feature, Time 8:00 PM EST	Jennifer Presley
I need to export all my data as CSV, when would i get this feature?	James Taylor
Do you give any offers for NGO ?	Jennifer Presley

Demo Request, Feature Request, Special Offers

### L3 Escalations

Subject	Assigned to
Unable to upload images on IE8 Browsers	Jennifer Presley
Unable to log in to my Web App using my mobile phone	James Taylor
My Web App crashes on older versions of Android	Jennifer Presley

Bugs, Issues, Crash

Now that you have addressed all tickets that came your way you may also have tickets that you delegated to others and are due that day. This list will help you effectively follow up and close them as promised to your customers.

### Due Date

Subject	Assigned to	Due Date
Unable to upload images from a IE8 browser ?	Jennifer Presley	20 Feb 2014
Tender for mobile infrastructure construction	Scott Williams	20 Feb 2014
Get back to me with bulk order discounts	Jennifer Presley	20 Feb 2014

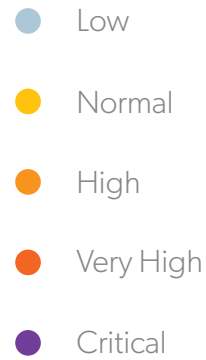
### **Stay diligent**

It is just not enough to go by volume of tickets. It is also important to stay smart and understand which of those tickets need immediate attention rather later. Your ticket management processes would help you identify that through priorities and SLAs. Get your reports and metrics of tickets, filtered by those values.



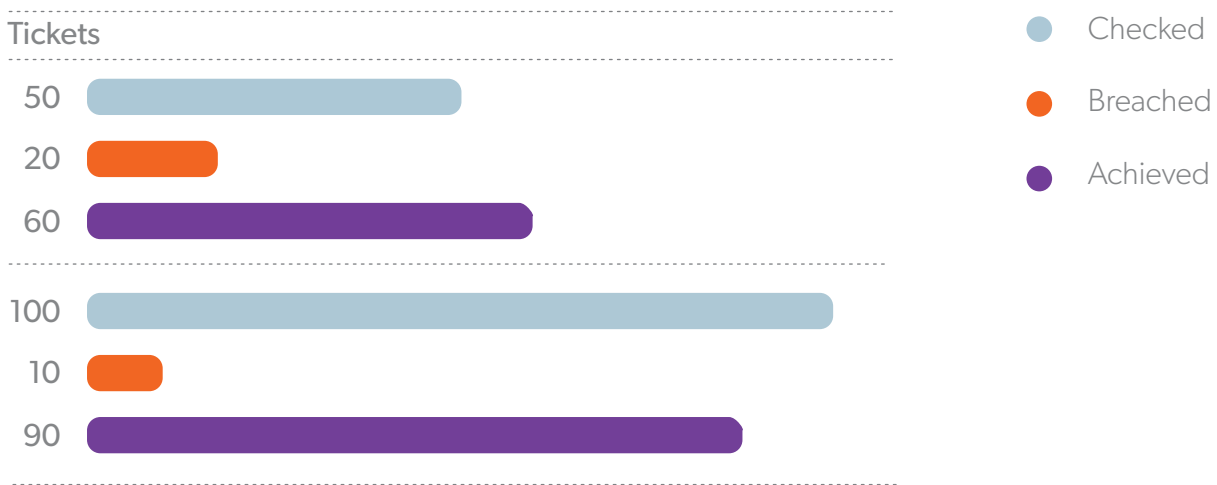


Tickets by Priority



### SLA Performance

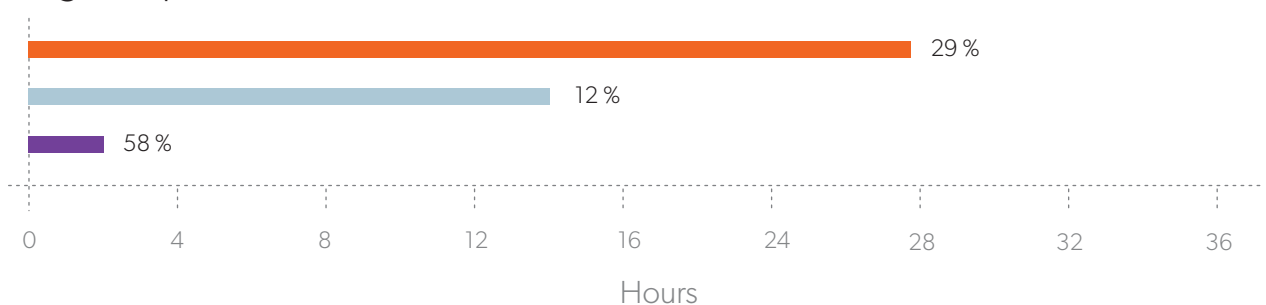
Tickets



### Be Effective

You might always be on your toes helping out customers by prioritizing their issues. But there is still a good chance that not all customer requests are getting answered in time, especially when the conversations continue beyond one touchpoint. Keep a tab on the average ticket response time, in addition to closing every customer issue within a couple of touch points. Response time metric directly influences your customer's satisfaction.

### Average response time



# Metrics that help you manage staff

## *for Support Managers*

While your support staff is busy managing your organizational relationship with customers, it is important for you to understand and adjust the staff activities from one level up. Accurate delegation requires appraisal of the situation from staff perspective and strategic goals from executive perspective. To carry out the task of a support manager exceptionally, here is what you need to know.

1. Know if you are meeting your customer expectations consistently
2. Delegate tickets to appropriate staff for faster resolution
3. Assess staff productivity and training needs
4. Effective project management

### ***Reports to help you address bottlenecks***

Your support process bottlenecks could come in the form of support staff's lack of knowledge on a different issues, lack of time from your L2 and L3 support to address issues in a timely manner or identifying tickets that fall through cracks for some reason. Getting these items in your visible zone would help you delegate effectively.

### ***Know your team***

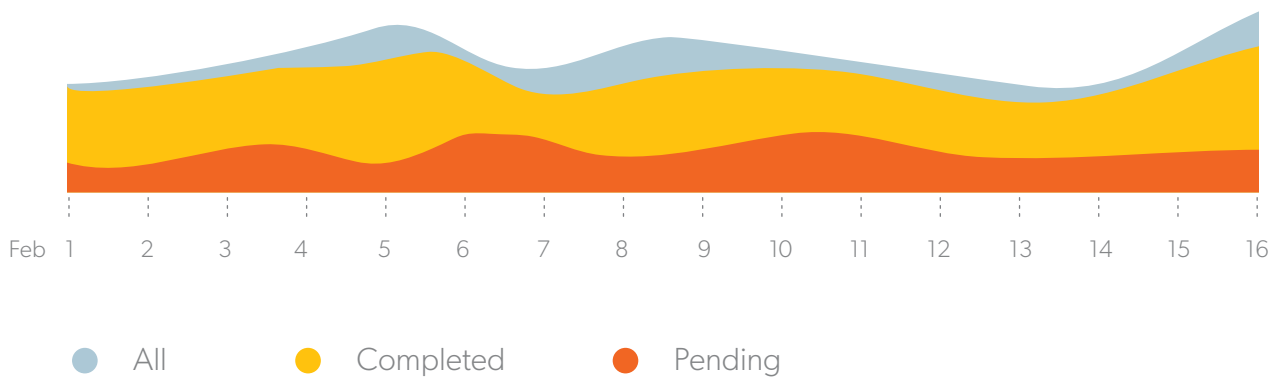
Regularly assess your team's performance to make sure if the response time and resolution time targets are regularly met. If the team members are able to understand customer issues effectively before giving solutions they could help customers avoid creating more tickets or come back with more questions.

### ***Plan for the future***

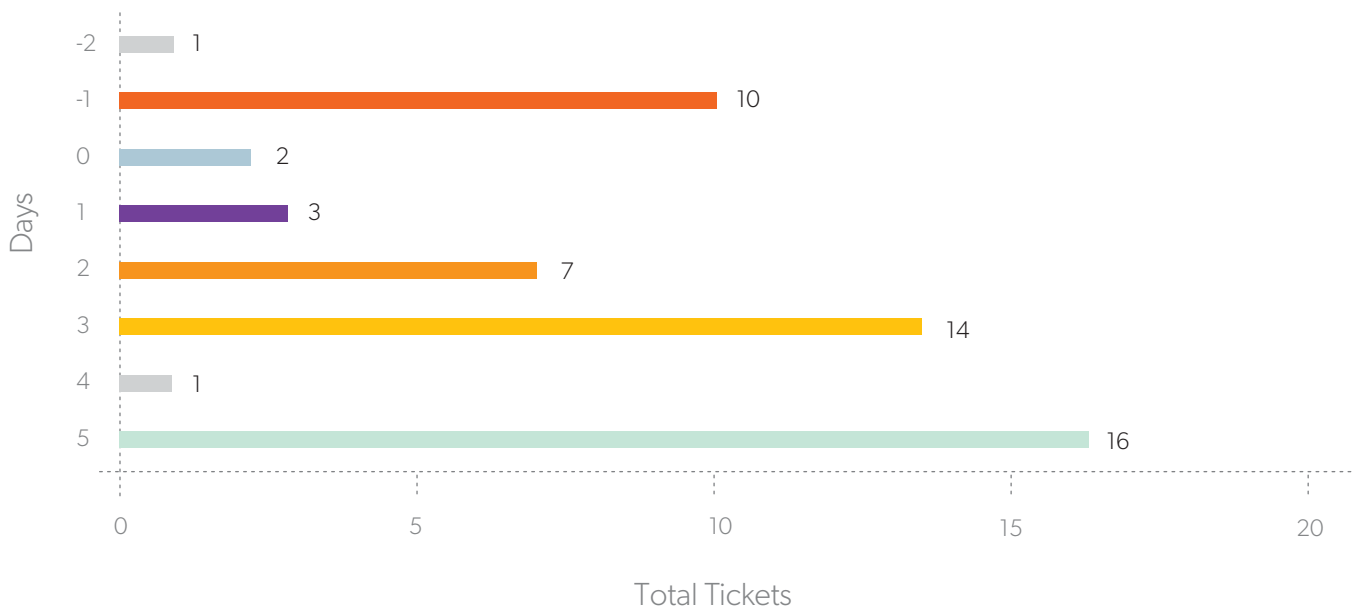
Check tickets that are being escalated to L2 and L3 regularly to make sure the numbers do not go over your threshold limits. Knowing these numbers would help you organize staff training on specific topics and also know who you should hire next.



## Backlog of tickets



## Tickets by age



## L2 and L3 staff participation

Staff Name	Assigned	Participated	Pending	Completed	Time Spent	Private Notes	No of Replies
Level 1 Support	100	80	40	20	13	3	34
Level 2 Support	50	20	20	10	5	12	20

# Metrics that help you manage teams and drive decisions

## for Executives and Business Unit heads

Your team of staff and managers might be performing their best to help your customers. But how would you know if your teams are aligned to your organizational goals and if their processes are sustainable as you grow? You might have to understand the following to design your supporting metrics.

1. Customer satisfaction level
2. Ability to predict trends from customer complaints that would influence the direction of your product or business
3. Keeping budgets intact

### Customer satisfaction

Customers who are not happy with your support would not help you grow your business in any direction. All you might need to understand is whether your customer and support staff conversations are resulting in positive engagement keeping your key customers happy.

Customer Name	No of Tickets	Participated	Completed Tickets	No. of Replies	Time Spent
Phillip	100	50	25	40	40
Mark	50	30	12	34	23
Acme Widgets Co	24	12	22	5	28

How nice was my reply?

★★★★☆

Adam

Thanks for your quick revert and resolve the issue.

Submit

Ratings » Last week » Emily

Overview

4 Ratings	4 Total personal ratings
8.75 Average Rating	8.75 All time average



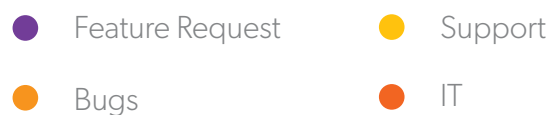


## ***Predict trends and invest wisely***

It is important for you to understand what type of issue is making your customers nag. Understanding the key issue sources could help you predict where you should invest next. You could go on further from here to adjust your processes, add new customer support channels or build resources to educate customers fast and easy. It could even be a trigger to make you think ponder about a change in technology, new product feature, performance improvement or a roadmap decision.



Tickets by Status



## ***In-control of Budgets***

This is a no-brainer of sorts to be regularly appraised of your department's financial situation. If you have deployed channels and resources that could cost you heavily with increasing usage, you need to monitor them and mitigate proactively.

Having seen how different people within an organization can approach help desk metric problem, one thing you need to keep in mind is - to make sure you measure indicators that are in your control rather measuring things that are provided by your tool.

It is important your help desk practices and processes are directly aligned with your customer's expectations and business needs. Acquire right tools that help you make decisions faster and thereby helping your organisation collectively to stay closer to your customers.





# happyfox

Created and distributed by

**HappyFox Inc** CA, USA

HappyFox is a help desk ticketing system that is hosted on cloud, supporting multiple customer support channels like email, voice, social media and live chat.

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