Analyzing and Unifying an Incident Processing System

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Background

- Users will often experience errors due to configuration, program error, or random bugs

- These errors are submitted as "incidents" through a Customer Support Portal and then routed through the Product Support department

- The incident resolution process is tracked by Product Support Managers and Global Functional Managers based on various key performance indicators

- KPIs:
  - Customer Satisfaction (CSAT)
  - Quality Assurance Analysis (QAA)
  - Initial Response Time (IRT)
  - Ongoing Response Time (ORT)
  - Calls to Customers (C2C)

Problem

- Product Support Managers (PSM) are responsible for checking these various KPI statistics on a daily or weekly basis

- Manager must manually input the query details including time, engineer, customer, and other incident-specific data points to get the result set showing raw data

- Data then imported into various analytics software for Visualizations and trend analysis

- Repeated for each KPI the manager wishes to investigate each day

Proposal

- Unify the systems to consolidate the data sources into single interface and creating tiles, so the manager can immediately see how a specific KPI is trending

- Create actionable tiles to allow the managers to immediately respond to any concerning information and lend aid the prevention or spreading of further issue
  - EX: Clicking on a tile showing trend downward on confirmed/auto-confirmed would open the relevant incidents immediately, and an outlook email/Skype incident directly to Engineer

Prototype

My Home   Configuration and Testing

Submit New Incident	My Open Incidents	My Incident History	Survey Requests	Request Expert Call
0	7		4	

Configuration and Testing

Configure New Product	Test in My System

5
Incidents

Items (3)

Incident Number	Submission Date	IRT	ORT	Status	Last Response
155,233	10/30/18	0	55	In Process	11/16/18 Y >
154,677	10/14/18	0	0	Waiting for Customer Update	11/17/18 N >
155,466	11/18/18	600	600	New	12/31/18 Y >
155,334	11/14/18	0	366	In Process	11/14/18 N >
154,677	10/14/18	0	0	In Process	10/30/18 Y >

Report Escalation	View History	Review Communication
! 0	🕐 78	✉ 3

Standard ⌄
Not Filtered

New Tasks Pending
Complete for Team

10
of
10

View All

Survey Scores
Total Surveys for Week

15

Target 10   Deviation 50%

Total Incidents Solved
Total Solved for Week

↘34

Target 40   Deviation -15%

Incidents Open with Team
Pending Engineer Update

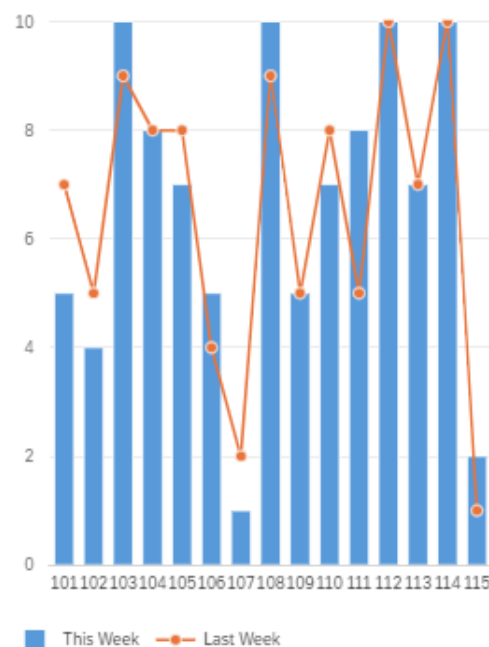|	
Red Inc 124690	32 minutes
Green Garage 124325	45 minutes
Blue Shop 124342	100 minutes
Grey Industries 124123	285 minutes
Teal Timeworks 124877	360 minutes

This Week and Last Week by Question 1

■ This Week   ─●─ Last Week

Incidents by Solved and .

■ Group
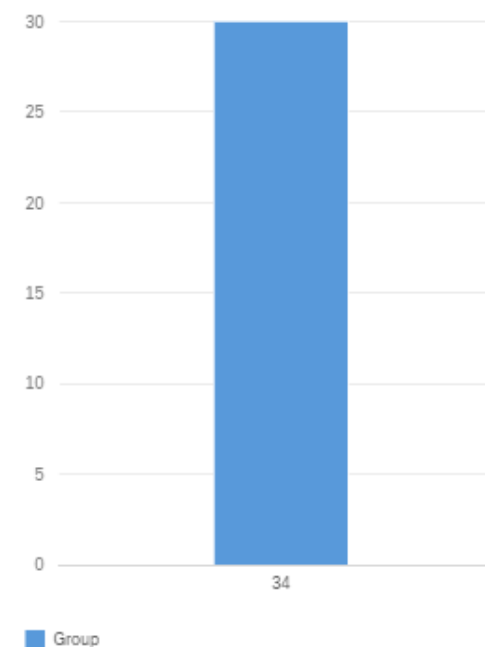
Database

Component

Contract

Customer

Employee

Incident

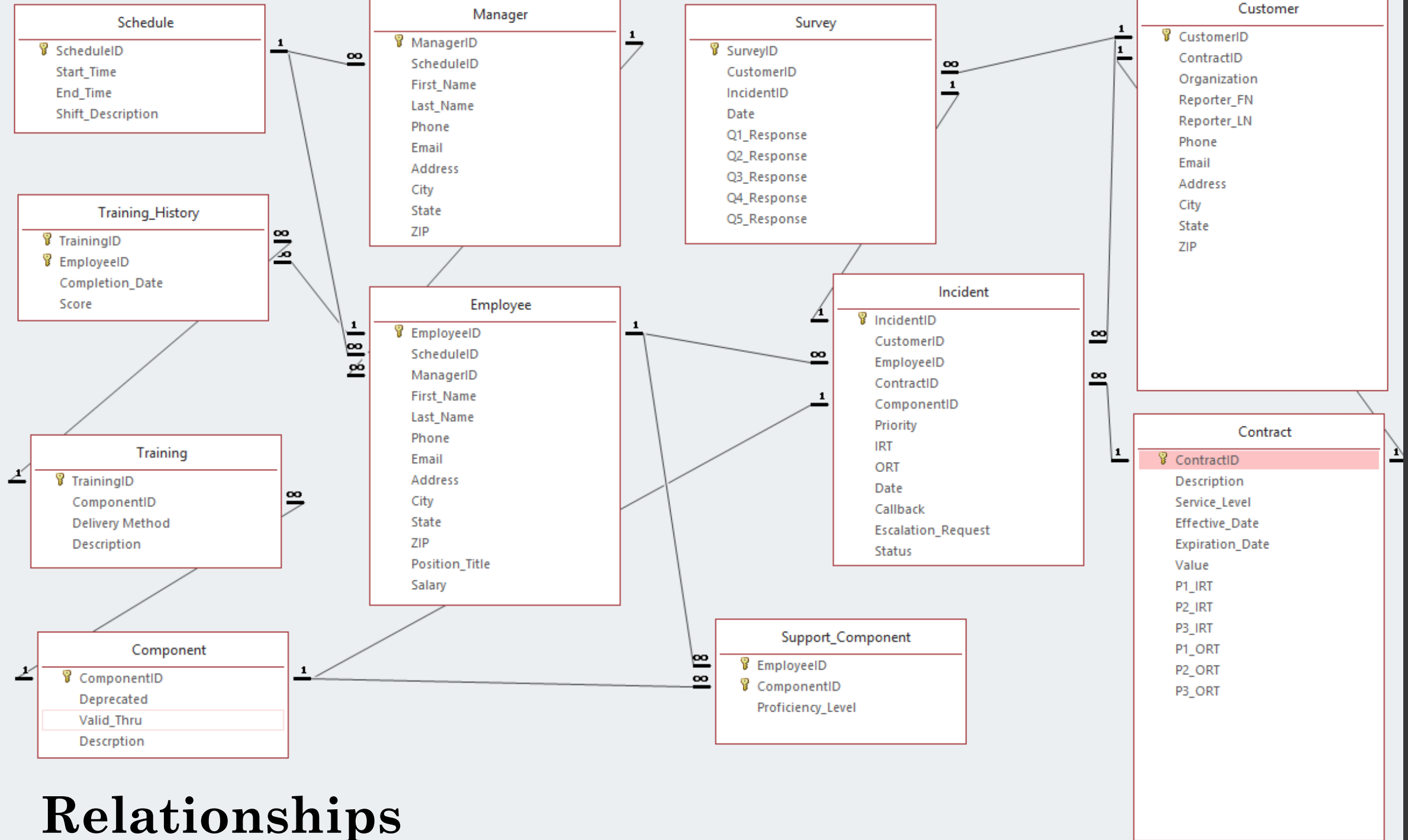Manager

Schedule

★ Support_Component

Survey

Training

★ Training_History

Access Database

- Built to reflect all relevant data for the incident process and relevant entities

- Required additional tables to factor into the Manager's reporting process and employee system

★ Denotes Association Table

Relationships

Forms

incidentprocessingportal.com/Contract/

Input Contract Details

Please fill out all the questions listed below. Refer to the legal contract details for any additonal questions.

ContractID | ContractID

Description | Enter description here

Effective Date | 1/1/10

Expiration Date | 1/1/10

Contract Cost | Enter contract cost here

Initial Response Time (IRT) | P1 minutes | P2 minutes | P3 minutes

On-going Response Time (ORT) | P1 minutes | P2 minutes | P3 minutes

Save **Submit**

BIGCOContract 1csa44

incidentprocessingportal.com/trainingrequest/

Training Request Form

Please fill out all the questions below. Your request form will be automatically forwarded to your direct manager. If you would like a copy sent to you for your recods, please indicate in the space provided below.

EmployeeID:

Training Description:

Date | 1/1/10

Related Support Component | Select One

Forward Request Receipt | ○ No ◉ Yes | E-Mail

Save **Submit**

BIGCOTrainReq 1csa09

Employee Information

incidentprocessingportal.com/employee

Please fill out all the questions below. If you have any questions please contact your Human Resources Representative.

First Name *(Name)*   Last Name *(Name)*

Date of Birth 1/1/10

E-Mail *(E-Mail Address)*   Phone 1-(###)-###-####

Address *(Street Address)*

City *(City)*   State State   Zip *(Zip Code)*

Position Details

Position Title *(Position)*   ManagerID *(ManagerID)*

Salary *(Salary)*   ScheduleID *(ScheduleID)*

Start Date 1/1/10

Save   **Submit**

BIGCOemployee 1csa22

Manager Information

incidentprocessingportal.com/manager

Please fill out all the questions below. If you have any questions please contact your Human Resources Representative.

First Name *(Name)*   Last Name *(Name)*

Date of Birth 1/1/10

E-Mail *(E-Mail Address)*   Phone 1-(###)-###-####

Address *(Street Address)*

City *(City)*   State State   Zip *(Zip Code)*

ScheduleID *(ScheduleID)*

Save   **Submit**

BIGCOmanager 1csa10

incidentprocessingportal.com/Incident

Submit Incident

Please fill out all the portions listed below. Once you hit submit, any relevant IRT/ORT timers will begin. Refer to your contract details for any additional information on agreed upon SLAs.

CustomerID

ContractID

Support Component — Select One ▼

Priority — ● Very High (P!) ○ HIgh (P2) ○ Regular (P3)

Initial Response Time (IRT) — P1 [minutes] P2 [minutes] P3 [minutes]

Ongoing Response Time (ORT) — P1 [minutes] P2 [minutes] P3 [minutes]

Description — Enter description here

Date — 1/1/10

Request Callback — ○ Yes ● No

Request Escalation — ● Yes ○ No

Save   **Submit**

BIGCOIncident 1csa54

incidentprocessingportal.com/survey/

Thank you for taking the BIGCO Product Support Survey

Please answer the questions below. You may skip any question and save your progress if you wish to leave and return to the page. This survey will expire **14 days** from incident confirmation. Refer to the scale below for assistance with questions 1 through 5.

	Extremely Dissatisfied	Dissatisfied	Neutral	Satisfied	Extremly Satisfied
How satisfied are you with the support provided by your Support Engineer?	○ 1	○ 2	○ 3	● 4	○ 5
How satisfied are you with our products and product offerings?	○ 1	○ 2	○ 3	○ 4	● 5
How satisfied are you with Product Support in general?	○ 1	○ 2	○ 3	● 4	○ 5

	Extremely Unlikely	Unlikely	Neutral	Likely	Extremly Likely
How likely are you to recommend Product Support within your organization?	● 1	○ 2	○ 3	○ 4	○ 5
How likely are you to use Product Support again in the future?	○ 1	○ 2	○ 3	● 4	○ 5

Enter any additional comments or concerns here

Save   **Submit**

BIGCOSurvey 1csa99

Reports

Training History Report

Search Training History

Employee First (First Name)   Employee Last (Last Name)

EmployeeID (EmployeeID)   Component [Select One ▼]

Completion Date from: 10/01/2018   Completion Date to: 12/01/2018

Submit

First Name	Last Name	EmployeeID	Completion Date	Score	Component
James	Smith	1443	10/28/2018	57/60	CO-AGT
Maria	Jones	1082	11/02/2018	75/75	CP-VHE
Sam	Weeks	1687	11/25/2018	40/75	CA-CDD

Incidents Solved by Processor

Search Incident History

Employee First	(First Name)		Employee Last	(Last Name)

Employee First: (First Name)

Employee Last: (Last Name)

EmployeeID: (EmployeeID)

Component: Select One ▼

Confirmed Date from: 10/01/2018

Confirmed Date to: 12/01/2018

Priority: Select One ▼

CustomerID: (CustomerID)

Submit

First Name	Last Name	EmployeeID	Confirmed Date	CustomerID	Component	Priority	IRT Met	ORT Met
James	Smith	1443	11/28/2018	24568	PO-CZT	High	[X]	[X]
James	Smith	1443	11/22/2018	27882	CP-BPE	Very High	[X]	[X]
Sam	Weeks	1687	11/20/2018	29325	NI-DSS	High		[X]
Sam	Weeks	1687	11/01/2018	29412	BA-BDD	High	[X]	
Sam	Weeks	1687	11/10/2018	27445	BI-DPS	Very High	[X]	[X]
Sam	Weeks	1687	11/27/2018	20398	RE-LXS	Regular		[X]