

How to read the new Metrics Reports

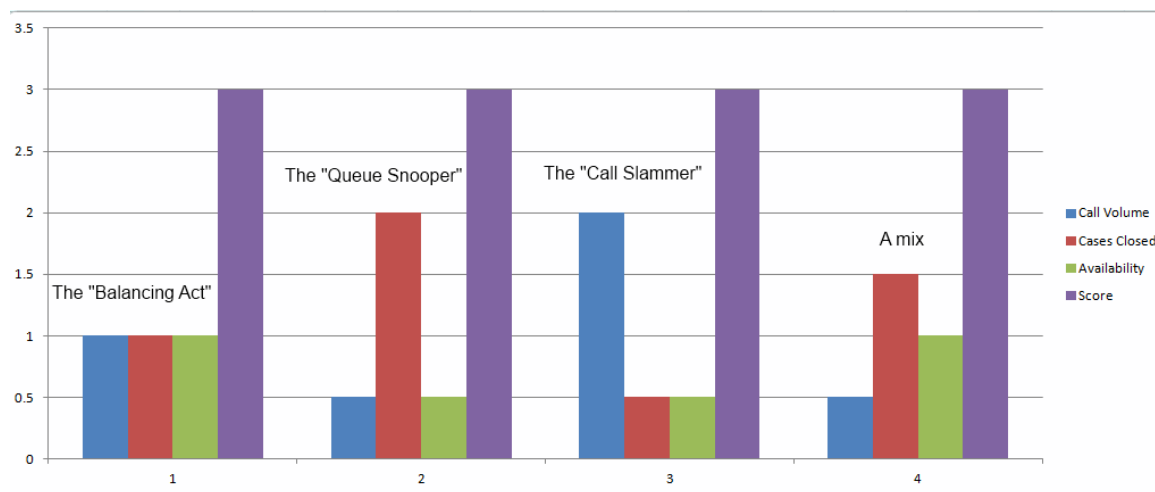
[Employee View](#)

[Manager View](#)

The first thing to understand about this report is not what it shows but what it fixes. Previously, our metrics were based on arbitrary numbers that analysts were expected to achieve every day. This type of metric is inaccurate because it fails to factor in that our call demands do not always permit an analyst to meet the set target. Our metrics also did not account for types of productive behaviors other than ones set for daily call targets. This new style of metric aims to correct that via these three principles;

1. Organize existing measurements and add **context**.
2. Maintain the integrity of these measurements via **checks and balances**.
3. Ensure that these metrics stay relevant though **flexibility**.

To illustrate these principles, we can consult the following chart which represents a scaled down version of the overall report.



Here we see 4 columns, each representing a key feature of the new metrics.

1. Call Volume
2. Cases Closed
3. Availability (to be reintegrated once SQL issues resolved)
4. Final Score

This chart showcases the checks and balances, context, and flexibility of the new metrics. By measuring analysts based on several key behaviors, then scaling them against each other we create a system which can grade everyone uniformly for the work that they do, even if it is not the same type of work. As you can see the four columns represent different work styles that are all productive, but could not until now be measured equally.

Now that we see how the new metrics can measure different work styles equally, let's delve into what each measurement means and what it does for the help desk.

1. The Call Volume Grade.

The Call Volume Bonus measures the amount of inbound calls an analysts takes as well as how many outbound they make and then compares that number to a "target."

$$\text{Target Calls} = \left(\frac{\text{Calls Answered}}{\text{Daily L1 Staff}} \right)$$

This metric benefits the Help Desk's ASA and SLA targets.

2. The Cases Closed Grade

The Cases Closed Bonus measures how many cases and analyst opens in a given day versus how many they close. This metric directly affects the queue growing or shrinking. If the bonus is higher, the analyst reduced the queue, lower, and they have increased the queue.

3. Availability

Availability is how much time out of an analysts' shift was spend in productive states such as ready, talking, and not available (outbound calls). This metric is conducive to a low ASA and prohibitive to non-productive activities.

4. Player Score

The Player Score is the overall score generated from tracked metrics and is graded on a 1.0 - 4+ scale similar to a school GPA.

You may have noticed another important measurement missing from this list: Customer Surveys, Call Recordings and Case reviews. This is because these items are not sufficient in sample size to apply directly as a daily metric. Doing so would result in an inaccurate score.

A critical feature of this report that was lacking from the previous metric system is the addition of checks and balances, that is, ways to identify if someone may be attempting to artificially raise their scores. In this report there are 3 specific features built in to track potential abuse.

1. The Cases Closed Bonus Change

With the removal of vendor dispatches from the cases closed amount, it is possible that an analyst may not fully troubleshoot an item and replace it prematurely. This measurement shows the difference between the Cases Closed Bonus with dispatch accountability and the version with no dispatch accountability. If this number rises beyond the average, it may be advisable to perform a case review

Cases Closed	Vendor Dispatch	Case Bonus	AVG Bonus
32	1	1.07	1.11
First Contact	Dispatch %	W/Dispatch	W/Dispatch
25	3.23%	1.03	1.10

2. The Outbound Calls per Case Closed Ratio

This ratio is created by removing first call closes from an employee's stats, then comparing the remaining closes against outbound calls made per day. Effectively this tells us, on average, how many outbound calls an employee needs to make before they close an open case. Should this number rise above average significantly or frequently, a case review may be advisable.

Outbound Calls
2
Calls per Close
0.29

3. Call Variance

The call variance formula result are read as distance from 0. The further in the negative, the more likely it is that an employee closed cases without needing to perform a call back or closed multiple cases in one call. The further positive it is more likely that an employee either did not create a case for an inbound call, updated an existing case, or opened multiple cases on one inbound.

Cases Opened	Cases Closed
31	32
call variance	First Contact
-3	25

$$\left(\frac{\left(\frac{\text{Cases Closed}}{\text{Cases Opened} - \text{Dispatches}} \right) + \left(\frac{(\text{Inbounds} + \text{Outbounds})}{(\text{Target Calls})} \right)}{2} \right) = \text{Score}$$

$$\text{Target Calls} = \frac{\text{Calls Answered}}{\text{Daily L1 Staff}}$$

Call variance = (total phone events – outbound calls – cases opened) – (cases closed – closed first contact).

$$\text{Calls per close} = \left(\frac{\text{Outbound Calls}}{(\text{cases closed} - \text{cases closed first contact})} \right) =$$

Cases Closed = Cases marked “Resolved”

Cases Opened= New Tickets Created

Dispatches= Cases with vendor dispatch created via Vendor Tab

Inbound= Call received from Q1-4 via Cisco Agent

Outbound= Any action triggering phone hook to become active on line associated with Cisco Agent

Calls Answered= Total calls from Q1-4 answered by helpdesk analysts, does not include Hang ups, voicemail or disconnects.

Daily L1 Staff= Total number of L1 analysts scheduled for the business day.

**This report makes no distinction between an inbound or outbound call. Each counts equally and it may be better to think to them as simply "Phone Events."*