

Assisted Support Best Practices

Which Metrics to Track and How to Calculate Them

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EXECUTIVE OVERVIEW

Operational metrics are the foundation of a support organization. The SSPA's Benchmark Database provides valuable insight into best practices for technical support metrics, but to take advantage of this tool, you must be accurately tracking and monitoring your own metrics. For assisted support, support organizations should track customer interaction metrics for automated call distribution, incident handling and resolution, and escalations, across phone, Web, email and Chat channels. This document outlines key assisted support metrics, how to calculate them, as well as providing insight into best practice results to enable you to gauge your performance against your industry peers.

BEST PRACTICES FOR INBOUND TECHNICAL SUPPORT METRICS

Customers have a variety of preferences for requesting technical help. Many prefer access to a toll-free number via telephone, while others prefer email, Web input or chat. Best practices provide responsive, consistent support across all forms of inbound requests for assistance. Further, all of these methods are likely to be used in the successful resolution of the customer issue. There are a variety of terms that are used to describe inbound requests – incident, service request, trouble ticket, case, etc. For the purposes of this document the term incident will be used.

There are unique requirements to effectively handle inbound telephone requests, and they will be discussed first. The requirements of email, Web and chat are very similar and will be discussed together. Finally, when the initial contact support representative is unable to provide a timely resolution, or the customer requests it, the incident will need to be escalated.

Inbound Telephone Call Management

Most organizations have some form of inbound call management system, like an Interactive Voice Response (IVR), that answers a customer call and allows the customer to select from a menu of service options.

A good phone menu system is limited to tasks that are essential and quick, in order to avoid overloading the caller with too many choices. Voice prompts are brief, to the point, and in the customer's language. Menus are updated regularly in order to keep their information current.

Well designed IVR menus cut the time required for customers to navigate menus and access the required information, as well as minimize the number of misroutes requiring live transfers. Best practices for IVR design include:

- Customers hear no more than 5-6 choices at any one time
- The more frequently-selected choices are presented first
- There are no more than 3-4 levels to the menu
- Menu options are repeated if the caller does not make a selection after a certain amount of time
- There is an easy way to either reach a live person or return to the main menu
- If the customer makes an invalid selection, the system provides additional information and guidance
- Promotional messages are kept short and ideally can be skipped
- Voice prompts provide clear instructions throughout the system, using consistent vocabulary and phrasing

Automatic Call Distribution (ACD)

ACD technology is used in higher volume assisted support environments to expedite the process of connecting a customer to the first available support representative, as well as ensuring that a customer call is routed to a representative with the appropriate skills to respond to the customer's needs. ACD systems track and report metrics that are used by call center managers to help manage their staff and inbound call volume effectively.

ACD systems route according to customizable rules and operational variables including real time agent availability, time of call, customer type, product type and required technical skills.

Best Practice Metrics include: time to qualified support representative, hold time, abandonment rate, talk time, etc. The best practice is for system reports to be available in real time so that managers and support representatives can take corrective action when call metrics fall outside desired goals. As a reference, SSPA Benchmark results for three key ACD metrics are shown in Figure 1. The average for all members is shown, along with metrics for consumer, enterprise and small and medium sized businesses (SMBs).

Figure 1: SSPA Benchmark Results for Key ACD Metrics

SSPA Benchmark Results for Key ACD Metrics				
Metrics	Industry Avg.	Consumer	Enterprise	SMB
Hold Time (minutes)	2.8	2.5	1.3	2.6
Abandon Rate (percent)	7.5%	3.7%	5.9%	8.4%
Talk Time (minutes)	14.4	11.2	14.5	15.7

Source: 2007 SSPA Benchmark

In this section, important phone support metrics are detailed, along with how to calculate each.

Phone Response Time (Minutes)

The average time it takes a customer to get to a qualified representative that can respond to the issue. The measurement is the average elapsed time from the receipt of the request to the response to the customer by an appropriate support resource to acknowledge the request, respond with a incident number and begin working the issue. This includes call transfers or the time until a call back occurs. The formula is:

(Total Time to Respond to Phone Incidents) Divided By (Total Number of Phone Incidents)

Best Practice Metric: The Best Practice is to route the call to the appropriate Support Representative in less than 1 minute, 90% of the time.

Phone Hold Time (Minutes)

The average time it takes once a customer is through the IVR and is placed on hold waiting for a qualified representative. For best practice this is the time it takes to be connected with the best qualified support engineers across the organization and the globe. The formula is:

(Total Time on Phone Hold) Divided By (Total Number of Phone Incidents)

Best Practice Metric: In order to attain the Phone Response Time Metric this should average less than 1 minute.

Phone Abandon Rate (Percent)

The percentage of calls that hang up before being answered. The abandon rate metric begins counting hang-ups after 10 seconds to account for wrong numbers or calls in error. Additional adjustments for this metric can be made to account for on-hold announcements that provide answers (e.g. response to a known problem) or offer the customer take another action (e.g. use the Web). The formula is:

*(Total Abandoned Phone Calls) Divided By (Total Number of Phone Incidents) * 100*

Best Practice Metric: In order to attain the Phone Response Time Metric of responding to 90% this should average less than 3-5%.

Email, Web and Chat

The organization needs to provide an electronic system that accepts, tracks, routes and manages Web, email and chat customer issues through the resolution process and records all customer interactions. The system:

- Tracks customer profile information, including entitlements
- Manages the incident workflow including the initial routing; handoffs required, escalations, and prioritizations
- Integrates input from different communication channels
- Allows the creation of operational metrics reports
- Integrates to other tools such as chat, instant messaging, knowledge base, billing, etc.

To facilitate responsive resolution a form should be provided for input of required information to assure proper routing of the incident to the next available qualified

support representative. The tracking of email, Web and/or chat should be based on the same incident-tracking system that supports the phone and documented incident handling process.

The workforce scheduling and skill based routing to the appropriate support representative used for telephone support should be adapted to handle routing of email, Web and chat requests. Chat should be near real time response, email and Web submissions should be auto-acknowledged, and support work initiated within 30 minutes of receipt.

Incident Resolution

The incident is considered resolved when the customer agrees that the information or solution provided satisfies their request. In this section important incident resolution metrics are detailed, along with how guidelines to calculations where applicable.

First Contact Resolution (Percent)

First contact resolution is a key goal in real-time support models (direct to engineer models where work is routed to a resource trained to close calls, or online chat). In order to drive the percentage high, Best Practice dictate a full training program that ensures front line Support Representatives have the breadth and depth of skill to resolve issues on first contact.

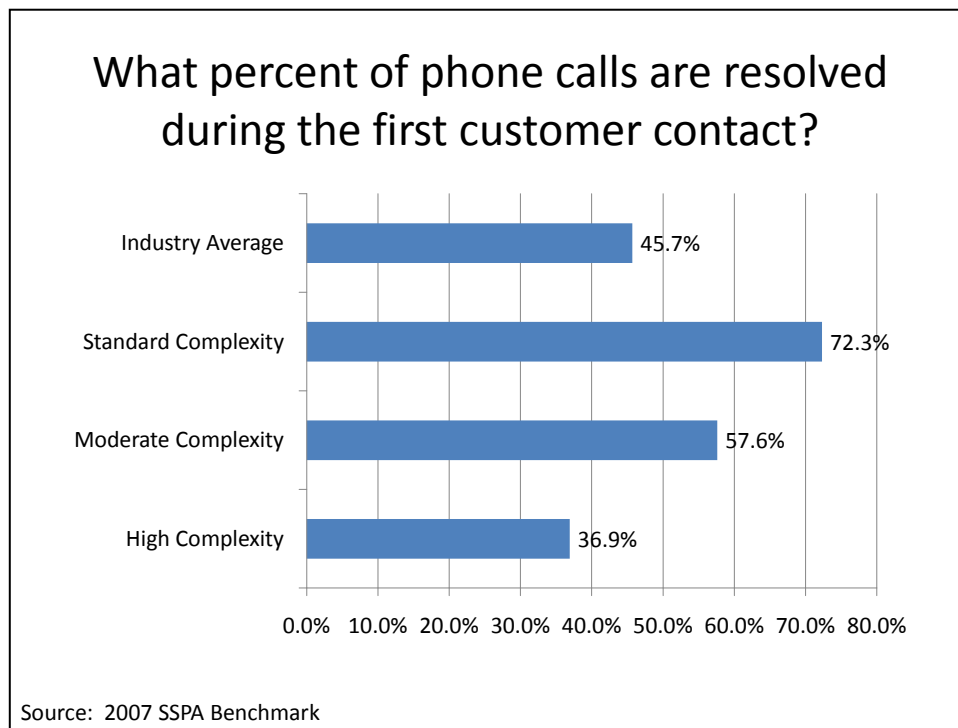
Resolution times should be tracked and reported based on the source of the inbound incident – telephone, email, Web, chat. There will be natural variations across the method of entry, but should be consistent within each – i.e. telephone.

The formula for real-time support models is:

*(# of Resolved Incidents Closed in the First Call) Divided By (Total # of Incidents) * 100*

Best Practice Metric: This will vary by the complexity of the product offering. Figure 2 shows average first contact resolution for all members, as well as the average by complexity of product supported.

Figure 2: First Contact Resolution Rates Vary by Complexity



First Day Resolution (Percent)

Of the incidents that are not resolved on first contact, it is important to do the research to resolve as many as possible in the first business day. The formula for real-time support models is:

*(# of Resolved Incidents Closed in the First Business Day) Divided By (Total # of Incidents) * 100*

Best Practice Metric: According to the SSPA Benchmark, the industry average for issues resolved within 24 hours is 57.7%. Note that as with first contact resolution, average metrics change with product complexity, with Standard at 74.7%, Moderate at 72.0% and High at 49.4%.

Incident Status

In those situations where the incident cannot be resolved within a business day, a process should be in place to provide the progress towards resolution on a regular basis.

Best Practice Metric: For long running incidents status should be given at least every other day. For high priority incidents, this should be at least every two hours.

Best Practices for Escalation

At times, customer issues require more advanced skills, longer times, additional resources or interaction with R&D to resolve issues. The customer may also demand additional resources to progress satisfactorily to resolution. This is handled in the escalation process and typically involves a second/third level of advanced support.

The key metric used to determine the need for internal escalation include Average Incident Resolution Time. Incidents that exceed the average should be reviewed by managers to assess the need to involve additional or advanced support resources. The support representative who opens the incident should also be trained to recognize when incident diagnostics determine additional assistance is necessary.

The process for handling escalations, including customer requested ones should be documented to ensure that all escalations are handled in a closed-loop manner. The process includes criteria for escalations, whether requested by the customer or initiated proactively by the organization. The process defines who is responsible for communication with the customer for the duration of the escalation, including any special players that may be introduced during the escalation such as an escalation manager. The process defines an escalation path through the organization and the company. Escalation status is available at least daily. Real-time status updates are the best practice.

An effective escalation process is dependent on high quality documentation and communication between the initial contact support representative and the receiving support representative. The escalation process documentation should include guidelines for incident documentation requirements to assure that incident notes capture appropriate diagnostic data collected by the initial incident owner. This includes things like user steps that created the problem, diagnostic information collected, like log files, etc. In incidents involving potential product defects this will often require a reproducible test incident.

After each customer initiated escalation, a post-mortem analysis should be performed to identify the root cause and correct any issues uncovered during the escalation. This helps minimize future escalations.

THE SSPA RECOMMENDS

For support organizations developing a new metrics program, or re-evaluating an old one, follow these steps:

- **Step 1:** Assess where your practices stand against these guidelines. If you have not implemented real time telephone support, it should be your top priority. If you have, but are not meeting the Best Practice Metrics, work on the steps to improve your metrics.
- **Step 2:** Develop the process improvements necessary to achieve the targets set from Step 1. You will need to become familiar with the Erlang method of forecasting call volumes and establishing support representative schedules.
- **Step 3:** Once you have achieved real time response to your telephone support, you should focus on improving responsiveness to email, Web and chat based support. Too often electronic support is being viewed as “fill work”, and not given the same attention to responsiveness that telephone support gets. That is not serving the customer who is looking for responsive support from all channels. (And can encourage them to use your telephone support more frequently!)

RESOURCES

An excellent presentation by Dave Brown of Support University titled “Why “Call-back” doesn’t work, And how to move to “Real Time”” is available at this location:

http://www.thesspa.com/Login/Member/Resources/conference_presentations/sandiego2007/sd_07_best_practices.asp

Members of the SSPA who have successfully made these transitions are willing to share their experiences, and tips and techniques. We are happy to assist you in making these connections. You also can get assistance through the SSPA Inquiry or Advisory Services.