

**Achieving Help Desk Excellence With Customer Satisfaction Measurement**  
*By Bob Gale, NetReflector, Inc.*

With technology support shifting from troubleshooting simple questions to supporting a company's global business strategy, the role of the help desk is rapidly changing. These days, the help desk is expected to play an integral part in the overall customer experience and becoming a true extension of a company's brand – no matter what customers it supports (internal, external, or a blend of both.) Yet, the help desk still faces challenges of its own, including hiring, staff training, productivity and cost containment, and performing such a balancing act only ends up putting more pressure on already stretched resources. One way a service desk can deliver and win on all these fronts is to embrace an essential business driver as a key performance indicator: customer satisfaction.

Although at first sight, customer satisfaction seems easy to understand, it can actually be difficult to define, and sometimes even more difficult to measure. This article presents a general, pragmatic approach to customer satisfaction measurement, including tips and recommendations to help desk professionals implement a brand new initiative or improve an existing program.

***Homegrown or outsource?***

If your help desk is looking into implementing a customer satisfaction measurement program from the ground up, you will inevitably face the dreaded question: homegrown vs. outsource? To ensure you make the best decision for your organization, prepare a business case weighing the pros and the cons of each option. Be aware that your decision will be largely influenced by the type of customers you support, and the amount of internal resources you have available, including people and technology.

If you are a help desk services outsourcer, you will most likely benefit from using a third-party vendor to produce an unbiased "performance report card" you can present to the external clients you support. If on the opposite end of the scale, your service desk only supports internal IT users and you assess you have enough human and technology resources to develop a solution internally, you may want to keep this process in-house. Nevertheless, make sure you understand or inquire about customer satisfaction measurement best practices to avoid common pitfalls.

If you know your internal staff resources are scarce and implementing data analysis and reporting is extremely labor-intensive and time-consuming due to internal technology limitations, then relying to an outside expert will help alleviate the pressure. Your timeline for implementing such a program to meet corporate business objectives will also be a determining factor in outsourcing or not.

### ***Choose the right data collection method***

Esteban Kolsky, Research Director at industry research firm Gartner, explains: "Enterprises that are currently drowning in customer information lack effective metrics to make informed, real-time decisions during interactions that deliver business value to both customer and business. Right now, surveys are the most underutilized aspect of customer service and poor surveying techniques result in 95 percent of enterprises discovering the cause of a customer's defection only after the fact."

Today's trends show that businesses are increasingly coming to their senses about the strong interdependence between the quality of service delivery and long-term customer loyalty. Measuring customer satisfaction with service and support is rising on the corporate initiative priority chart. As illustrated by the findings of the Help Desk Institute's 2003 Practices Survey in which 724 companies participated, there is an increase in the current use of customer survey software (43.2% in 2003 against 39% in 2002.) In addition, 25.8% of respondents declared they planned to add such software within 12 months. Despite these encouraging results, there is still room for improvement: survey findings also reveal that 28% of respondents still have no plans of implementing any customer survey solution, and nearly 20% of them admit they still don't conduct any customer satisfaction surveys at all.

Paul Sutherland is Global Quality Assurance Manager for Accenture's Help Desk Services. He is responsible for a Quality Assurance (QA) team tasked with defining the global quality management program for the company's help desk function, which emphasizes customer satisfaction and performance measures. Its five contact centers located in five different countries around the world handle more than 4,000 customer support interactions daily. Paul explains: "Our organization provides technical support to over 70,000 Accenture personnel in more than 25 countries as well as 10 external customers around the world. The bottom line for me is that the customer, no matter who he is, has immense information to share. Measuring customer satisfaction is a great way to tap into that valuable resource to implement effective change and tangibly measure the impact of any changes we make in terms that matter most."

To be successful, your customer satisfaction measurement program needs to be *ongoing*, a best practice that is still too often misperceived. Requesting feedback from your customers once a year is just not enough if you want to continuously improve your organization. A help desk organization can gather customer satisfaction feedback in a variety of ways. A good rule of thumb to jump-start your success is to emulate each customer's preferred method of communication: if they prefer phone support, then use phone-based surveys. If web-based or email support is preferred, then sending email-targeted surveys after a support case is closed may be advisable. Nevertheless, one survey method is not necessarily mutually exclusive of the other. In today's market where time delays can be costly, especially as it relates to preventing an external customer from defecting to a competitor after what they may consider a bad support call, real-time measurement will provide your organization with a competitive advantage from the get go.

### ***Define metrics that support your specific business objectives***

It is obvious that in the bigger scheme of things, every company's ultimate goal is to enhance its bottom line by managing costs while increasing satisfaction levels to turn customers into loyal, long-term sources of recurring revenue. The performance metrics you choose to derive from your customer satisfaction data, whether they are human-, process- or technology-related, will be the ones that are vital to your specific operations.

You can leverage customer satisfaction data in a variety of ways: to identify systemic staff training and operational issues early on, so you can start developing and implementing long-term agent motivation and retention programs or to find out the key business drivers that will help determine product and service areas that need more resources. If you are a help desk services outsourcer, you can evaluate your overall performance in the terms that matter most to the client companies that you serve.

Monitoring some or all of the following metrics will help you towards gathering trend data over time and implementing change strategies to increase customer satisfaction:

- Speed of answer averages
- Average handle time
- Wait (hold, queue) time averages
- Abandon rates
- Complaints percentages
- Service-level compliance ratios
- Wrap time averages
- Closed on initial contact

What works best is to attach targets to each of these metrics, and treat these targets as actual objectives that help desk managers, teams and individual agents are accountable for.

The smaller the number of metrics chosen, the better, so you really focus your efforts on a handful of mission-critical change strategies. If you have a global help desk organization, it is useful to draw performance comparisons across individual help desk locations, geographic regions, individual agents and incident category.

### ***Make reporting work for you and your stakeholders***

Reporting is the next step in your customer satisfaction measurement program. Choosing the right report formats is very important at this stage because reporting in itself serves two main purposes: first, turn raw data into insights you can take immediate action on; second, communicate findings with all your various stakeholders.

Translating the data into knowledge and then into action is a challenge in itself. Keep in mind that what you want to find out is what *really* matters most to your customer, so you base your decisions on safe, objective information. While a help desk manager might perceive technical ability and knowledge of their support staff as being the most valued by the customer, the customer may find the agent's level of empathy and friendliness the most important thing of all. Some more sophisticated reports, such as a key driver analysis, have been designed to specifically address these types of questions. Also, if you chose a mix of survey

methods to map back to your organization's multiple customer touch-points, make sure your reporting leverages that balanced feedback and offers you the ability to compare inputs from these various customer contact points (phone, web and email.)

The second challenge is for reporting to "speak" to your different audiences. From executives and external clients to your very own help desk team, the information needs to be delivered in a format that suits individual needs. Make sure you understand what data is important to each of your audiences and how they visually want it presented, so it makes most sense to them.

In conclusion, what does the future hold for the help desk as it relates to customer satisfaction? There is no such thing as a help desk crystal ball, but one thing is certain: customer satisfaction is a key business driver. If today's enterprise wants to remain agile on all fronts and respond to the needs and preferences of customers in a timely fashion before they have a chance to defect to a competitor, customer satisfaction measurement is something the help desk just cannot afford *not* to do. Over the past five years, help desk organizations have shown they can rise up to new challenges and adapt to changing environments around them: measuring the voice of the customer is one of many new challenges that, over time, will become an integral part of the help desk's daily business.

#### ***About the author***



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## Sidebar

### Top 8 Best Practices for Help Desk Customer Satisfaction Measurement

**1. Define clear business objectives** – To ensure the success of your customer satisfaction measurement program, start with defining clear business objectives and design your program accordingly. Avoid moving to the next step until you have reached consensus on these objectives.

**2. Gather objective data** – Preferably use a third-party organization to help collect your customer satisfaction data whenever possible to eliminate bias, particularly if you are a help desk services outsourcer.

**3. Measure regularly** – Try and measure customer satisfaction as close to the customer interaction (e.g. a support call) as possible. If you can, integrate your satisfaction measurement program with the system you use to track support cases, and have the satisfaction survey triggered after a support case closes. If integration is not possible, then measure satisfaction at monthly or quarterly intervals.

**4. Make your data actionable** – Ensure that each question in your survey will provide you with data that you can take action upon. As a test for determining whether or not a question belongs, ask yourself this: “What action will I take based on the results of this question?” If you are unable to answer this, consider rewording or removing the question altogether.

**5. Think global** – In order to get a representative sample of your customers, give your worldwide customers an opportunity to provide feedback by distributing your customer satisfaction surveys in the local language of your overseas help desk locations.

**6. Complete the loop** – In addition to internal stakeholders, present your performance improvements to your external customers on a regular basis too. By completing the loop with your survey respondents, you are confirming that their feedback is important and increasing the likelihood of future participation.

**7. Measure ROI** – Whatever solution you decide to adopt, measure ROI of your program by tracking satisfaction trends over a 12-month period and understanding the impact of changing satisfaction scores to the company bottom line.

**8. Listen, learn and improve** – Listen to what your customers tell you and leverage satisfaction survey results to drive continuous improvement efforts and positive change to reach help desk excellence.