

*Effectively Balancing Speed, Quality
and Cost Metrics*

*Leveraging a Remote Support Platform
to Create a Services Dashboard*

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EXECUTIVE SUMMARY

Effective and profitable customer support operations require a strong balance between speed of delivery, quality of support, and cost of operations. To ensure customers receive the optimum experience and all service level agreements are met, yet still protect and improve profit margins, support management must keep a close eye on metrics, making constant adjustments to the organization as products supported and customer requirements evolve.

To proactively monitor the health and performance of support operations, TSIA Research recommends the creation of a services dashboard—a consolidated view of all critical metrics that provides instant visibility when the balance of speed, quality, and cost is threatened.

In this report, TSIA provides recommendations on what qualitative, quantitative, and cost metrics to include in a services dashboard for customer service or technical support. Also, we will show how TSIA member companies are leveraging innovative remote support platforms to create and automate effective services dashboards.

CUSTOMER SUPPORT: A METRICS-DRIVEN OPERATION

Customer support operations are arguably the most metrics-driven department in most companies, and rightly so. For large call centers, for whom a few extra seconds on each customer phone call can add up to millions of dollars a year in additional costs, having a strong metrics program is critical to success. However, TSIA member companies struggle to identify which metrics are the most important to monitor across the hundreds of data points available.

For more than 20 years, TSIA has been working with support organizations on their metrics programs, creating a benchmark database of more than 300 metrics to which member companies contribute data annually. Once entered, companies can compare their performance in each area to that of their industry peers, identifying specific metrics needing improvement.

In this report, TSIA Research will explain the three types of metrics—operational, quality, and cost, recommend specific metrics to track in each area, share industry averages for key metrics to help with benchmarking, and discuss the creation of a services dashboard to allow an instant view of the organization's health as well as to enable early detection of problems before customers or profit margins are impacted.

Operational Metrics: Monitoring Speed of Delivery

Operational metrics are those typically associated with speed or velocity of delivery, and are usually captured by telephony systems for phone calls, multi-channel management platforms for e-channels, incident management systems, or remote support platforms. In order to understand interaction volumes and their impact on service delivery, TSIA Research recommends tracking the following operational metrics:

- **Incident volume by channel.** Understanding incident volume trends is critical for staffing plans and quality control to ensure you have enough support technicians available to handle inbound volume. Each company will find unique patterns in volume peaks, with Mondays and Fridays often the busiest days; companies that support accounting systems typically see peaks around tax deadlines; retail firms see peaks associated with holiday seasons. Incident volume must be tracked for every supported customer channel, including phone, email, Web, Web chat, etc.
- **Hold time and abandon rates.** A major contributor to customer satisfaction, hold time measures the amount of time customers wait in a phone or Web chat queue waiting for an available agent. As call times extend, customers lose patience and hang up the phone. The percent of callers who hang up before reaching a live person is the abandon rate. As hold times rise, so do abandon rates.
- **Incident handling time, average talk time.** This metric tracks the average time support technicians spend talking to customers or working on an incident. More experienced support techs can resolve issues faster, lowering talk time or handling time. Managers should monitor these metrics to identify if employees need additional training in technology or customer service skills—sometimes coaching on how to close the conversation may be helpful.
- **Response and resolution rates.** Response time measures the amount of time it takes customers to reach a support technician; resolution rates measure the average time elapsed before an incident is closed. It is important to track metrics by channel. As seen in *Table 1*, many companies give phone incidents priority treatment, ignoring email or Web incidents until phone volume drops. Also, being able to identify response and resolution times by problem type will help indicate when additional training may be needed to speed issue resolution.
- **First-contact resolution.** A key contributor to customer satisfaction, first-contact resolution (or FCR) means the first support tech the customer speaks with solves their problem on the first interaction—an ideal support scenario. Typically, incidents resolved on the first contact are also less expensive for the organization, as incident handling time is shorter. FCR rates should also be tracked by channel. When email or Web incidents have low FCR, it may mean additional required fields should be added to collect more information from the customer up front, eliminating the need for multiple interactions to gather needed data.
- **Reduced escalation rates.** Escalation rates are a major contributor to incident cost. Most support organizations have multiple levels or tiers of support techs, with higher levels offering

Ultimate Software

“Since implementing Citrix Online’s GoToAssist, we have decreased our call-handling time by 50 percent.”

—Heath Propper,
Director of Technical
Support, Ultimate
Software

greater expertise. Incidents that must be escalated to Level 2 or Level 3 cost more, not only because incidents are open longer but because these more expert support techs have higher salaries. Support management should identify issues being escalated that could be resolved at a lower tier with additional training, ideally shifting a higher percentage of employees to the less expensive Level 1 over time.

- **Incidents resolved within 24 hours.** In the minds of a customer, if an issue can't be resolved on the first contact, the next best thing is having it resolved the same day. This metric may depend on what service level agreements (SLAs) are in place, as many companies have a commitment in customer SLAs to attempt to resolve issues within one day, if possible. Also contributing to customer satisfaction, support management should track when average issue resolution stretches beyond 24 hours. As with previous metrics, track the percent of issues resolved in 24 hours by channel to ensure email or Web incidents aren't being ignored.

Table 1: Example Operational Metrics from TSIA Benchmark

Metric	Phone	Email	Web
Average response time	11 minutes	296 minutes (4 hours, 56 minutes)	196 minutes (3 hours, 16 minutes)
Average resolution time	1,560 minutes (1 day, 2 hours)	1,949 minutes (1 day, 8 hours, 29 minutes)	3,117 minutes (2 days, 3 hours, 57 minutes)
First-contact resolution	44%	34%	30%
Closed within 24 hours	56%	46%	40%

Remote support technology has been proven to impact multiple operational metrics, including talk time, incident handling time, and first-contact resolution, by streamlining problem identification and issue resolution. By allowing agents to investigate problems directly using remote control, instead of walking customers through diagnostic questions and processes, elapsed time for incidents in which remote support is leveraged typically trend down. Also, if additional research needs to be performed to resolve the issue, the agent can automatically pull customer system logs into the support case to study after the call, cutting the actual time spent on the phone with the customer.¹

Qualitative Metrics: Monitoring Customer Satisfaction and Loyalty

Qualitative metrics are those that measure the level of support quality delivered to customers. Qualitative metrics can differ greatly by company depending on what quality means to the organization. Though TSIA Research recommends tracking customer satisfaction and loyalty as the most important qualitative metrics, other metrics that contribute to quality of delivery include adherence to service level agreements (SLAs), quality monitoring data from third-party workforce management solutions, number of product defects, and programs such as NetPromoter.² At a minimum, TSIA Research recommends tracking the following qualitative metrics:

- **Post-incident surveys by channel.** When an incident closes, customers should be surveyed about their experience. Surveys should be executed for all supported customer channels to be certain quality is consistent across touch points. For assisted support surveys, TSIA Research recommends that customers are surveyed about multiple aspects of the interaction, including customer service skills, technical knowledge, completeness of solution provided, time to respond and resolve, and satisfaction with the incident overall.

To receive the highest response rate to satisfaction surveys, it is critical to send the survey as soon as possible after the interaction. In *Figure 1*, a sample post-session survey from Citrix Online's GoToAssist product is shown. The customer is immediately prompted with this survey when a remote session ends, streamlining the capture of satisfaction data. It is also important that enough metadata is collected about each interaction to allow satisfaction scores to be filtered by product, geography, employee type, etc. In *Table 2*, average satisfaction scores are shown for direct employees and outsourced employees.

Figure 1: Post-Incident Satisfaction Surveys

The image shows a survey form with the following sections:

- Question: "How was the technical knowledge of your representative, Emily?"
Options: Excellent Good Poor Very Poor
- Question: "How was the professionalism of your representative, Emily?"
Options: Excellent Good Poor Very Poor
- Text: "Please leave any comments about your representative here:"
A text input field.
- Question: "How satisfied are you with the amount of time you waited for help?"
Options: Very Satisfied Somewhat Satisfied Satisfied Somewhat Dissatisfied Very Dissatisfied
- Question: "Was your issue resolved to your satisfaction?"
Options: Yes No
- Question: "How satisfied were you with your overall support experience?"
Options: Very Satisfied Somewhat Satisfied Satisfied Somewhat Dissatisfied Very Dissatisfied
- Text: "Please let us know what you liked about your experience, and what we should improve:"
A text input field.
- Submit button.

- **Self-service and/or community experience.** It is also important to survey customers about their self-service experiences, and TSIA Research recommends prompting customers with a short survey as they exit your self-service site or online community, or send a short survey via email after a session, asking if they found the answer they needed and if they have any suggestions to make the site more useful. These surveys can be used to calculate the rate of self-service success as well as document how many issues are being deflected to unassisted channels.
- **Periodic relationship surveys.** These quarterly or annual surveys measure the overall relationship, not specific support interactions. Additionally, in enterprise accounts, relationship surveys go to the account holder, such as the vice president of service or even a CIO, while transactional surveys go to system administrators, providing a balanced view from all levels of the account. Individual questions on the survey should ask about overall support experience, satisfaction with products, and value received from products and services.
- **Customer loyalty.** Customer satisfaction is important to track, but no formula exists to show exactly how a rise in satisfaction impacts the bottom line. To help

Sage Limited

“GoToAssist enables us to improve the quality of service we provide to key customer groups, increasing customer satisfaction and first-time resolution.”

—Andrew Cooper,
Project Manager,
Sage (UK) Limited

link the customer experience to revenue, it is also important to ask customers the loyalty question: do you intend to continue purchasing products from this vendor? This one question may tell you more about the health of your accounts and their future profitability than any other metric. Any customer that says no to this question should be immediately referred to an account manager to understand any issues thwarting their success.

Table 2: Post-Phone Average Satisfaction Scores from TSIA Benchmark

Metric	Direct Employees: Satisfied	Direct Employees: Very Satisfied	Outsourced Employees: Satisfied	Outsourced Employees: Very Satisfied
CS skills	78%	65%	61%	54%
Technical knowledge	77%	61%	55%	47%
Completeness of solution	75%	60%	56%	52%
Time to resolve	74%	55%	52%	43%
Time to respond	76%	53%	54%	36%
Incident overall	79%	58%	63%	48%

According to TSIA members, leveraging a remote support platform can have a direct impact on customer satisfaction through improved service levels, convenience, and transparency. Companies using remote support say that customers enjoy using the tool, as they can follow along and see exactly what the agent is doing. According to Heath Propper, director of technical support for TSIA member Ultimate Software, customers have responded enthusiastically to Ultimate’s use of Citrix GoToAssist. “Customers often ask us to start a GoToAssist session as soon as the call begins.” With many factors influencing customer satisfaction, it may seem risky to directly contribute an overall rise in satisfaction to the use of remote support. However, multiple companies have reported that satisfaction scores are higher on average for incidents resolved using remote support.

Cost Metrics: Monitoring Profitability

Cost metrics are those that track operational costs, including revenue generated through service delivery and gross margins for service operations. Though in the early days of support many companies considered customer service a cost center, today's technical support and consumer call centers calculate gross margins based on maintenance and additional services revenue minus costs. TSIA Research recommends tracking the following cost metrics:

- **Gross margin.** The gross margin represents the percent of total services revenue that the service organization retains after incurring the direct costs associated with service operations. The higher the percentage, the more the company retains of each dollar of revenue. With value added services creating additional services revenue for premiere support options and upsell/cross-sell, service and support margins are becoming a very visible metric—even to Wall Street. As seen in *Table 3*, TSIA tracks gross margin two ways, both with and without a slice of R&D costs.
- **Hourly labor burden rate.** New in the 2010 TSIA Benchmark is tracking of average hourly costs of support employees. To ensure consistency for comparison purposes, TSIA Research recommends calculating labor burden rate as follows: salary or wages + overtime + cost of employee benefits + cost of applicable taxes. Use 2,080 hours per year as the standard number of available work hours per year to derive your hourly rate for this metric. Calculate the average for each level or tier. Not only can the average hourly rate be benchmarked, it can also be used to calculate other metrics, such as cost per incident or cost per issue.
- **Fully burdened cost per incident.** Another key cost metric added to the 2010 TSIA Benchmark is average cost per incident, which divides total costs by number of incidents resolved during that period. Average cost should be calculated for each supported channel using infrastructure costs for the channel and average time worked per channel. More mature organizations have more granular cost metrics, such as by incident type, useful when calculating cost savings for deflecting specific issues to self-service.
- **Training days per year.** With agent customer service and technical skills contributing to overall productivity and customer satisfaction, measuring the amount of training provided to support employees is helpful to ensure adequate training without over-reaching on cost. The TSIA Benchmark measures the average number of days of training received for new employees and employees with more than one year of experience.

Marketron Broadcast Solutions

"Citrix Online helps us limit our training and support costs."

—Lee Roquet,
Director of Client
Services, Marketron
Broadcast Solutions

Table 3: Example Cost Metrics by Industry from TSIA Benchmark

Metric	Enterprise Hardware	Enterprise Software	Consumer Hardware	Consumer Software
Gross margin (with R&D costs)	35%	42%	20%	13%
Gross margin (without R&D costs)	47%	55%	51%	36%
Technical training per year	12.5 days	11 days	6.8 days	10.2 days
Customer service skills training per year	3.9 days	3.3 days	4.1 days	5.6 days

Remote support platforms impact cost of operations by boosting first-contact resolution and lowering incident escalations, so more issues are resolved by lower-cost Level 1 support techs. Additionally, TSIA members have reported that leveraging remote support can also cut employee training time and raise employee productivity, allowing organizations to do more with less.

Creating a Services Dashboard: Consolidated View of Metrics

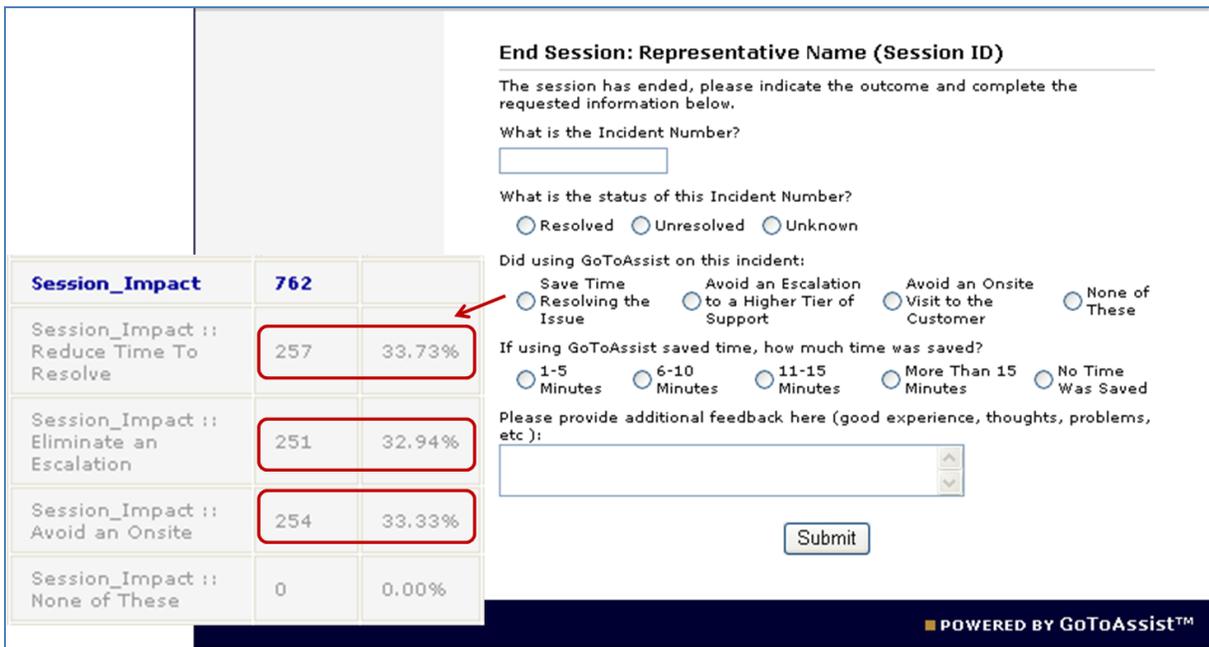
A reporting dashboard is a graphical summary of metrics that allows managers to monitor the contribution and health of the departments in their organization. To gauge exactly how well an organization is performing, a dashboard captures and reports critical data points from each department within the organization, thus providing a snapshot of overall performance. By having the right dashboard in place, a management team can better monitor the performance of the services organization and identify areas that need attention.³

Ideally, a dashboard should also identify live customer interactions in which the support technician may be struggling, such as an abnormally long talk time, and allow a supervisor to intervene. An innovative set of features available from best-of-breed remote support platforms, such as Citrix Online’s GoToAssist, allows supervisors to monitor all remote support sessions in progress, with supervisor silent monitoring capabilities to listen in to any interaction without being detected. If the

support tech is struggling, the supervisor can make their presence known, take control of the session, and move the issue to resolution.

An example of a dashboard from Citrix Online can be seen in *Figure 2*. By automatically capturing post-interaction survey data, supervisors have a real-time display of value delivered to customers and cost savings to the company, such as field services visits avoided and resolution time saved.

Figure 2: Example Services Dashboard from Citrix Online



An ideal dashboard has several required elements. First of all, a dashboard should be constructed with an intuitive graphical display that is easy to understand and requires little or no training to interpret. For an example, instead of displaying just numbers, the user interface could also show if each metric is in the target zone or if attention is needed; speedometer-like dials are often used. The data should be real-time—or as close as possible—so managers know what is happening at all times, and adjustments to staffing or priorities can be made as volume and issue complexity shifts. Finally, data from multiple sources should be consolidated into a single view, meaning a portal structure and multiple integrations may be required.

When creating a services dashboard, remember to:

- **Implement in phases.** Though combining every metric into a single view is ideal, this typically means multiple integrations, some more difficult to create than others. Start with creating a single reporting view using data from your primary platform, such as your remote support solution or a CRM application. Next, prioritize each additional data point based on the value of the information and cost of integration. With leading platforms such as Citrix Online offering many packaged integrations, bridging data access to third-party systems is not as maintenance-intensive as in years past.
- **Create dashboards for each employee profile.** A mature metrics program should document which metrics should be monitored at each level of the organization, with front-line managers looking at different metrics than shift supervisors or technical leads. Creating a dashboard for each employee profile enforces best practices and keeps critical metrics for each role front and center.
- **Allow user customization.** Individual users should be able to customize their dashboard with additional data or reorder the display to meet individual needs. Allowing some level of customization gives employees more control and encourages user adoption of a new reporting program.
- **Extend beyond data to enable action.** Forward-looking companies are creating dashboards that do more than display data—they enable supervisors to take immediate action. The supervisor silent monitoring capability mentioned previously offers a way for managers to not only identify problem interactions, but lets them join the session, if necessary, to speed issue resolution.

TSIA RECOMMENDS

New support managers are usually promoted to their role because they are great support agents. While they may understand diagnostics and customer service, few new managers have a handle on operational, cost, and quality metrics and how they interrelate. Companies should develop predefined reports, reporting dashboards, and training materials to help new support leads and managers quickly learn how to monitor real-time data and make adjustments as needed to ensure service levels meet customer expectations. To create a strong metrics program, companies should:

- **Document existing metrics.** When starting a new metrics program, be sure to take advantage of any existing practices that work. Take an inventory of every metric in place today and how they are used. Some metrics tracking may have been added in the past and are no longer needed. In mature organizations, you may find that younger managers look at different metrics than more senior managers. Once you understand all of the relevant metrics, identify their interdependencies, such as the relationship between hold time and abandon rate.

- **Employ a services dashboard.** Expecting employees to pull multiple reports or to look in various locations for data almost guarantees that critical information will be overlooked. To streamline access to information and increase visibility, create a services dashboard, consolidating all key metrics into a single location to aid early detection of problems.
- **Benchmark your performance.** TSIA Research often finds a member struggling to improve a metric that is already above industry average, or ignoring metrics that are far below average. Without benchmarking against industry peers to identify gaps in performance and areas of excellence, a metrics program is flying blind.
- **Small changes have big impacts.** Once your metrics program is in place, calculate the potential annual cost impact of incremental improvements, even small changes to FCR, escalation rates, resolution time, etc. Small changes can add up to big savings in large organizations, helping to build the business case for investment in new people, process, and technology.

About Citrix Online

Citrix Online provides secure, easy-to-use online solutions that enable people to work from anywhere with anyone. Whether using GoToAssist® to support customers, GoToManage™ to monitor IT assets, GoToMeeting® to hold online meetings, GoToMyPC® to access and work on a remote Mac or PC, GoToWebinar® to conduct larger Web events or GoToTraining™ to train customers or employees, our customers – more than 35,000 businesses and hundreds of thousands of individuals – are increasing productivity, decreasing travel costs and improving sales, training and service on a global basis. A division of Citrix Systems, Inc. (Nasdaq: CTXS), the company is based in Santa Barbara, California. For more information, visit <http://www.citrixonline.com> or call +1 805 690 6400.

ENDNOTES

¹ For more information on metrics improvements and remote support, see the August 2007 TSIA Executive Insight, “Building a Business Case for Remote Support: Improvements in Key Operational Benchmarks Create Reliable ROI Model.”

² Net Promoter[®] is both a loyalty metric and a discipline for using customer feedback to fuel profitable growth in your business. Developed by Satmetrix, Bain & Company, and Fred Reichheld, the concept was first popularized through Reichheld's book [The Ultimate Question](#), and has since been embraced by many technology companies for measuring and improving customer loyalty.

³ For more information on constructing a services dashboard, see the June 2009 TSIA Services Insight, “The Services Dashboard,” by Thomas Lah, executive director of TPSA.