

How To Measure Helpdesk Performance

Gathering helpdesk statistics is harder than it might at first appear. However, a well-designed system can show up the performance of individual agents as well as that of the helpdesk as a whole.

By Roger Burton West

Corporate helpdesks cost money. Facilities and trained staff are expensive, and there is no immediate visible profit from their operation. It's clear that some do a better job than others, but what is meant by "better", and how can one get objective data to support such impressions?

Designing a metric for helpdesk performance is extremely easy; designing an effective one is significantly more difficult. One must keep in mind that the metric is only a proxy for actual performance, something often forgotten in the quest for simply-measured figures. Also, and most importantly, remember that agents will be aware of the details of the metric, and will work to fulfil it directly rather than to give the good service it is intended to represent.

Performance Metrics

For example, one common metric for agents is the time spent per call; if this is kept low, then in theory more customers can be helped and the helpdesk performs better. However, this is overly simplistic; some problems will always take longer to solve than others, and an agent attempting to minimise call time (in order not to appear a "poor performer") may give poor service to customers with such complex problems.

I have even observed agents inventing spurious procedures to be performed by the customer, or simulating line difficulties, in order to cut calls short - on the basis that when the customer calls back he is unlikely to speak with the same agent, and even if he

does this can usually be explained away. On an ISP helpdesk, for example, given that many users only have one telephone line that is shared between voice and data calls, this is particularly easy to achieve, and can even be genuine; there's often no way to find out whether a fix has worked without disconnecting and attempting to dial the ISP.

Thus, a problem which could have been solved in one 20-minute call takes eight or nine shorter calls to solve, leading to a less-happy customer who has perhaps spent half a day calling, trying something, and calling back. Moreover, more helpdesk agent time has been spent on this single problem than it truly deserved, meaning that fewer other customers have been helped.

The same problems occur if agents are rated by the number of calls taken.

Another metric which can be used is the total time spent talking on the phone, as a proportion of the time spent at work. While this will show up agents who take a long time to write up their call logs, it can also therefore discourage accurate logging and thus impairs service to repeat customers.

Even if agents are performing no other tasks (such as answering email queries), delays between calls due to low helpdesk loading can also confuse this figure; most phone systems will report time on calls, whereas what is really needed is time on calls, plus time waiting for calls, plus time writing up logs. Such a complex statistic is expensive to gather, in resource terms.

For measuring the performance of the helpdesk as a whole, one system often seen in the field measures the

total number of calls taken in a fixed period. The result is, just as seen before, that there is pressure to keep calls short. While the pressure does not fall directly on agents in this scenario, junior call centre managers often pass down the pressure they are under.

Measuring the number of distinct customer problems dealt with is better, but can be skewed by system problems outside the helpdesk's control, and again needs very detailed logging and log processing resources. This system also falls down for complex problems, creating an incentive to write them off as insoluble and get back to standard, simple problems.

In short, then, it appears that purely mechanical data-gathering cannot reliably produce the information required to judge the performance of a helpdesk or its agents. What can? For that matter, what is truly meant by performance?

Customer Satisfaction

What seems to be the best measure - assuming that the helpdesk is available without extra charge - is to consider the satisfaction of the customers. Consider not just whether the problem was resolved, since some problems are simply not soluble by the helpdesk, but how the customer rated the experience of dealing with the helpdesk, whether information was given quickly and was accurate and so on. The most reliable method of gathering this information appears to be the use of customer satisfaction surveys.

Logging is vital in this scenario. Every customer's email address must be taken - in an internal helpdesk or

ISP helpdesk this should be easy to arrange - and the customer is subsequently sent a short survey, ideally as soon as the call is completed, but in any event as quickly as possible.

The survey must be short enough to encourage its completion, consisting of no more than two or three quick questions. The object is simply to find out what the customer thought of the service provided.

One might wish to split the survey into questions about technical accuracy and manner of agent, but the information that is the primary requirement, and is the reason why the survey must be sent out as soon as possible, is the customer's state of mind immediately after the call. This is, after all, what most directly affects the customer's lasting impression of the helpdesk service and, for an external helpdesk, of the company as a whole. Indeed, it has been shown that a company with sub-standard service but a good helpdesk can retain loyalty long after most customers would otherwise have gone elsewhere.

It is probably easiest to process the call logs directly to extract the customer names. This allows the survey to be given a unique number, which will let the returns be processed to evaluate specific calls, and indeed allows the time of the call to be noted on the survey as a reminder to the customer.

Avoiding Disincentives

A potential problem is that agents may feel they have a disincentive to log calls for which the customer did not appear happy; a solution to this is to include in the log a quick rating of the agent's impression of the customer (eg, "just called to complain"), bearing this in mind when processing surveys. Another way around this is to give other incentives for logging (perhaps tying it directly to the phone system, such that a log form is started automatically when a call is taken, counting time spent logging as working time, or something similar).

Time spent writing up call logs can, in fact, be more valuable for problem resolution than time spent on a call, since it can save time and frustration in future calls with repeated explana-

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tions or attempts at the same standard solutions. It also serves to warn agents who might deal with the customer in future about any particular idiosyncrasies.

If agents have the facility of call logs when dealing with recurring customers, little persuasion should be needed to encourage timely and accurate completion, so long as the agents can be convinced that log data will not be used against them. Unfortunately, the actions of a number of organisations have created a culture of suspicion among agents of many management practices.

Survey Results

The surveys can be processed fairly simply, particularly if they are designed with a multiple-choice or rating-scale format. The agents' comments must be taken into account, and calls made to complain about events outside the control of the helpdesk should not be weighted as heavily as those about legitimate technical problems when rating the agents.

In the longer term it may be possible to bias the reports of specific customers, but this is probably an unwarranted complication except for heavy repeat users of the helpdesk service.

Agents should receive swift and public feedback for individual positive reviews as well as for high general ratings. One organisation with which I am familiar posts email messages of praise to the internal mailing list seen by all agents and their managers. Since many agents feel that they are ignored at the management level, direct attention by managers may be beneficial and even aid in retention of staff.

The helpdesk job is rarely a pleasant one - agents quite often take the flak for the rest of the company - and making the working environment more pleasant for those who do a better-than-average job is a cheap and easy way to retain skills within the helpdesk.

Conclusion

Effectively measuring helpdesk and agent performance is a valuable exercise, and it may help show up shortcomings in training or other areas. However, make sure you gather this information in a suitable way; it's important to avoid gathering statistics using crude, unimaginative methods which are open to abuse or can give misleading results.

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