Chapter 2 Help Desk Investment Worksheet

The goal of this worksheet is to analyze the current and previous budgets for the Help Desk, determine where additional funding should be allocated in next year's budget. The worksheet is a high-level guideline to get you started thinking about improvements as you continue through this book.

This Help Desk improvement checklist worksheet is intended to be used in conjunction with the related chapter in the [Help Desk Management Book by Wayne Schlicht](#).

Step 1 - Analyze the budget - Break out the Help Desk's budget in high-level buckets. Typical buckets are staffing costs, professional services, equipment costs, application costs, and such.

Step 2 - Review performance metrics - Gather metrics used to analyze the performance of the Help Desk. These metrics may include the following listed below. Don't worry if you are not tracking all these metrics. We will discuss these throughout the book to give you information on what they are, how to track them, and how to implement improvements.

- **Customer satisfaction surveys (CSat)** - A metric to measure the customer's approval of the support they received. Commonly a survey can be used to obtain feedback from customers after completing a support interaction.

- **Average Handle Time (AHT)** - An average of the handling time of all calls. Handle time of a call is the sum of talk time and after-call work.

- **First Contact Resolution (FCR)** - The ability to solve the customer's issue during the first interaction without calling the customer back or transferring the customer to another agent.

- **Average Speed of Answer (ASA)** - The total length of customer wait time in queue divided by the total number of calls. The phone system will calculate these metrics by agent and team.

- **Cost per Ticket -** Help Desk agent salary cost divided by the number of tickets created.

- **All other useful metrics –** In our discussion, we used CSat, AHT, FCR, ASA, and Cost per Ticket. When you build your scorecard, you can include these or modify the metrics used based on your needs.

Step 3 - Create a performance scorecard - Create a basic performance scorecard using a spreadsheet or other application. On one axis, enter the performance metrics. On the other axis, enter metric reporting time periods such as monthly, quarterly, and annually. See figure 2.1.

Example Basic Performance Scorecard									
	Target	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Additional Time Periods
Csat									
AHT									
FCR									
AWT									
Ticket Cost									
Additional Metrics									

Example of a performance scorecard

Step 4 - Set a target goal - Determine a target goal for each metric. The target goal should not be a stretch goal, but the minimum target needed for acceptable performance.

Step 5 - Analyze current performance – Review the most recent performance metrics against the target goal you set.

Step 6 - Add performance trends - Analyze the performance metrics trend by month and quarter. Some people add arrows to the trend as compared to last quarter.

Example Basic Performance Scorecard									
	Target	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Additional Time Periods
Csat	3.5	3.5	3.6 ⬆						
AHT	4:30	4:22	4:10 ⬆						
FCR	75%	76%	77% ⬆						
ASA	0:20	0:20	0:22 ⬇						
Ticket Cost	$3.00	$3.50	$3.15 ⬆						
Additional Metrics									

Step 7 - Improvement planning - Determine the areas that need improvement. In our example, we see ASA has a negative trend. Also, ASA and ticket cost is not meeting the target goal. These areas should be investigated to determine what resources and improvements are needed. Use the information provided in upcoming chapters to create an improvement plan.

Step 8 - Investment funding - Based on the improvement plan created, determine additional funding requests needed for next year's budget.