

# Chapter15: Help Desk Performance Reporting Scorecard Worksheet

*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](#).*

The goal of this worksheet is to analyze the current and previous budgets for the Help Desk. Then you must 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.

## Step 1 - Analyze the budget

Implementing improvements can cost money in the short term. However, in the long-term, improvements will save you money. The goal of analyzing the budget is to find some savings without just slashing the staffing amount. You may not be able to use the budget savings directly, but it is easier to get new expenditures approved when you identify the source.

## Step 2 - Identify budget savings to fund improvements

Break out the Help Desk's budget in high-level buckets if it is not already. Typical budget buckets are staffing costs, professional services, license maintenance costs, and such.

**Staffing costs** – Savings can be found by becoming more efficient using the process improvement ideas throughout the book. As your agents and processes become more efficient, you may be able to trim your staffing budget through attrition. For now, let us assume your staffing budget will remain flat.

**Professional service** – Now is the time to review your current professional service expenditures. You may have contracts in place with vendors for printer maintenance and other services, but it is never too soon to reach out to their competitors. See what another company can offer and the cost of that service. While you may not be able to change vendors immediately, you can leverage the knowledge to renegotiate your current contract.

**License and maintenance costs** – The hidden cost for all applications is long-term support costs. License and maintenance costs can add up quickly. Ensure your support coverage reflects what is needed versus excessive unneeded coverage. Work with your vendors to ensure your costs in this area is at the correct level required by your business needs.

## Step 3 - 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)** – CSat is 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)** – First contact resolution is 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)** – Average speed of answering the call is 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 4 - 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                  |        |     |     |     |    |     |     |     |    |                         |

Figure 2.1

**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.

**Analyze current performance** – Review the most recent performance metrics against the target goal you set.

**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                  |        |        |          |     |    |     |     |     |    |                         |

**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.

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

