Chapter18: Call Volume Management 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.

As we stated in the chapter, Help Desk managers will employ call volume management strategies to optimize the workforce, reduce costs, and improve customer satisfaction. There are many off-the-shelf applications, services, and solutions available to implement and can save money overall. Here are our recommendations.

Step 1 – Take a snapshot of the current costs, issue types, and call volume state.

Throughout this book, we explain how to gather call data such as cost per ticket, issue category type, and call volume. Taking a snapshot of the current costs, issue types, and call volume will give you a good starting baseline. This will allow you to use this baseline data to see if you are improving as you implement improvements.

Step 2 – Implement a self-service password management system.

Self-service password management systems have been around for a long time. Every phone system and ticket application has APIs to allow the self-service password management system to integrate seamlessly. Self-service password reset tools will give customers the ability to unlock, reset, and change passwords without calling the Help Desk. Self-service password reset tools can significantly reduce costs and call volumes. To implement a self-service password management system, follow these steps.

1. **Gather the password management activity data.** The activity data includes the volume of calls and tickets. The activity data includes the average duration of the calls and cost per call. The goal is to determine how much time and money your Help Desk is spending on password management.
2. **Research the current top password management systems available.** I did not include specific names in this book due to how fast technology changes.
3. **Create a finalist list.** Setup three password management vendors to provide a demonstration and a quote for their system.
4. **Select and implement the self-service password management system.** Once implemented, you should find a reduction in call flows to the Help Desk. This should improve metrics and allow you to adjust staffing levels to save money.

Step 3 – Implement front-end messages during events and outages.

A front-end message is a recorded message informing the caller of specific information. Typically, this message will provide the customer with a notice that there is an ongoing incident causing a widespread user-impacting issue. The goal of a front-end message is to inform the customer there is an issue, give them any available workaround information and ultimately hang up to reduce the volume of calls agents must handle. To get started.

- Ensure your phone system ACD allows front-end messages. If not, speak to your phone support team or vendor to enable it.
- Create a couple of front-end message templates. Even writing down a generic script will help. The last thing you want to do is try and create a front-end message from scratch during an event or outage.
- Create a procedure and train your staff on how and when to use front-end messages.

Step 4 – Implement automatic customer call-back service

A customer call-back service will ask the customer if they would like to avoid waiting and have a Help Desk agent call them back when they are available. Overall, a customer call-back service may lower your abandonment rate and improve customer satisfaction. To get started.

- Ensure your phone system ACD allows customer call-backs. If not, speak to your phone support team or vendor to enable it.
- Create a procedure and train your staff on how the customer call-back service works and what is expected of them.

Step 5 – Implement overflow assistance.

When call volume reaches a point where there are no available agents and the wait time for callers breaches a threshold, calls can be routed to the overflow assistance queue. To get started.

- Identify the resources that would be part of the overflow assistance queue. This could be the desktop support staff, network engineers, and other IT staff in the department.
- Create the call flow logic in your ACD for the overflow assistance queue and assign the members.
- Train the staff on when overflow assistance would be used and how it will work. This includes training the staff on how to log into and out of the overflow assistance queue.