Deep Benchmarking

- Project began summer 2002
- Details, charts, metrics available at http://web.mit.edu/is/about/benchmarking
- Article to be published in EDUCAUSE Quarterly in Jan/Feb 2004
We had to go deep, then be strategic

Establish partnership, scope

General understanding
  • Processes, definitions

Raw data
Metrics
Initial prep
Corrections

Sharing, teaching

Another tool for management, cultural change

Intense, deep, iterative project work
We linked goals to specific metrics and then created a dashboard.

**Be Cost Effective**
- Cost per case by topic
- Total costs by topic
- Cases by media, including self-help

**Invest Appropriately**
- % of budget
- Clients served/FTE

**Be Responsive**
- Elapsed time per case (days)
- Call abandonment
- Hold time
- Time to answer
- % of cases resolved on 1st contact

**Support Rollout of New Systems**
- Case volume by topic 3 months before and after launch
- Minutes per case

**Support Customer Needs with High Quality Service**
- Annual customer survey
- Spot-surveys on selected transactions

**Develop High Performing, Competent Teams**
- Employee satisfctn. survey
- Individual perf. metrics
- Team performance metrics
- Training $$ / FTE
- % Help Desk certification
- Case volume compared to staff skills mix

**Develop Effective, Mature Processes**
- # of contacts vs. # of days to resolve
- Origin of Help Desk cases
Metrics lead to action on many fronts

**Organizational**
- Increased budget; automated support
- Measure staff
- Stanford re-org: consolidation of all client-facing work
- Put HD staff on solid funding, not one-time $

**Managerial**
- Sharing metrics with staff, teams
- Refining metrics – measure the right things
- Specific responses: e.g., create “swat” team for Oracle rollout
- Everyone in IT tracks his/her time

**Cultural**
- Understanding data; recognizing similarities, push for action
- Collaboration across schools
- Apply metrics to all IT projects
- Value people with technical and behavioral skills
Metrics lead to action on many fronts

**Organizational**
- Increased budget; automated production support

**Managerial**
- Sharing metrics with staff, teams

**Cultural**
- Understanding data; recognizing similarities
- Push for action
Gauging investment and effectiveness

FY 03

<table>
<thead>
<tr>
<th></th>
<th>MIT</th>
<th>Stanford</th>
<th>Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>IT Dept Budget / University Budget</td>
<td>2.9%</td>
<td>4.0%</td>
<td></td>
</tr>
<tr>
<td>Help Desk Budget / IT Budget</td>
<td>4.2%</td>
<td>3.1%</td>
<td></td>
</tr>
<tr>
<td>Tickets / School Population</td>
<td>2.2</td>
<td>1.7</td>
<td>-48%</td>
</tr>
<tr>
<td>Population per HD Employee</td>
<td>712</td>
<td>1,010</td>
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<tr>
<td>Tickets / Help Desk FTE</td>
<td>1,595</td>
<td>1,675</td>
<td>5%</td>
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<tr>
<td>Help Desk Budget / Ticket</td>
<td>$41.83</td>
<td>$64.18</td>
<td>53%</td>
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</table>
Cost per Ticket

- Accounts
- Backup
- Business Apps
- Business Func
- Cluster
- Connectivity
- Courseware
- Email
- Hardware
- OS Software
- Other
- Printing
- Desk Software
- Security/Virus
- Web

Colors:
- MIT (Brown)
- Stanford (Yellow)
Metrics lead to action on many fronts

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Deep Benchmarking: 5 Iterative Phases

Prepare
- Define scope
- Set goals
- Form team
- Develop plan
- Teach team
- Launch

Study & Define
- Research literature
- Visit sites
- Map processes
- Define data
- Collect data
- Define metrics
- Calculate metrics

Interpret & Test
- Interpret at high-level
- Identify areas to explore
- Identify potential improvements
- Test initial changes

Operationalize
- Draft a dashboard
- Populate with available data
- Test and revise
- Make easily repeatable
- Use in operations

Leverage
- Use dashboard
- Publicize
- Replace existing reports
- Explore next area for benchmarking

Continuously test and revise
**Client Satisfaction**

Average Overall Sat.

- **4.52**
- N = 175, 5 point scale

**Problem Solving**

- 6 or more days: 25%
- 1 to 5 days: 13%
- < 24 hours: 62%

**Avg Cases Open**

- 689

**Phone**

- ACD Abandon Rate: 20%
  - goal is 10%

**Staff competency contributions to Client Satisfaction**

- Professionalism
- Communication
- Availability
- Timeliness
- Expertise
- Resolution

**Cases Created per day, by Medium Used**

- Web
- Email
- Voice

**Team Components of Residual Open Cases**

**Miscellaneous Statistics**

- Consultant ACD Logged Hours, average per day: 61
- Calls Offered, avg per day: 179
- Wait time, avg per day: 95 sec
- Length of call, avg per day: 6:36 m:s
- Cases created by phone: 38%
- Average Cases created per work day: 157
- Cases created outside working hours: 23%
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Managerial
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Facts prompted discussions about employee performance

![Bar chart showing hours logged FY02 for Stanford IT Help Desk (Level 2) staff members]

- **Managers D**: 130 hours
- **Staff Member C (75%)**: 294 hours
- **Staff Member A**: 414 hours
- **Staff Member I**: 461 hours
- **Staff Member E (55%)**: 532 hours
- **Staff Member B**: 623 hours
- **Staff Member H (80%)**: 630 hours
- **Staff Member G**: 676 hours
- **Staff Member F**: 1086 hours

Stanford IT Help Desk
(Level 2)
Hours Logged FY02
**Metrics lead to action on many fronts**

**Organizational**
- Increased budget; automated support
- Measure staff
- **Stanford re-org:** consolidation of all client-facing work

**Managerial**
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- Apply metrics to all IT projects
Stanford Helpdesks: Tier Where Resolved

See supporting data in Appendix 9
Data quantified support needed to rollout new systems

Impact: New Business Applications

Number of Trouble Tickets

Some rollout application tickets included in HDLevels 1 & 2.
Metrics lead to action on many fronts

**Organizational**
- Increased budget; automated support
- Measure staff
- Stanford re-org: consolidation of all client-facing work
- Emphasis on “professionalization” of Help Desk staff (solid funding, certified, etc.)

**Managerial**
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Summary: Planning a deep benchmarking project

- Choose a good partner
- Invest in site visits
- Plan for many iterations
- Have a dedicated project manager
- Metrics must be actionable and tell a story
- Allow time for others to internalize
- Ensure top-level management wants to use metrics in a meaningful way
Cultural Change:
Management by Fact

- Use facts to dispel the myth of the anecdote

- http://web.mit.edu/is/about/benchmarking