

## Operational Review Preparation

Where it exists, it would be beneficial for the following company information to be provided prior to commencement of the project:

### Strategic Planning

- Any documents, presentations or project plans, formal or informal, which describe the Service Desk's goals for the next two to three years. If the company or Service Desk has mission/vision statement and/or values system, then please provide these as well.
- Annual Operating Plan for the Service Desk.
- Investment Plans for the Service Desk.
- Organisational Chart from CEO to Service Desk team leaders including senior directors of development and sales.

### Organisational Goals and Objectives

- Examples of Client Contracts.
- Details of Tiered Support Offerings/Service Agreements.
- Service Level Objectives.
- Service Hours and language support.
- Services Marketing Collateral.
- Response and resolution time goals.
- Resource Modelling/Workforce Planning Details.
- Service Desk job descriptions.
- Case Resolution, Escalation, Knowledge Management, Critical Situation, etc., process documentation.

### Operational Reporting

- Examples of daily, weekly, monthly and quarterly Service Desk reports including (but not limited to) reports of
  - Case Volumes.
  - Case Types (how to, defect, within contract, non-technical, etc.).
  - Cases Opened (by Customer)
  - Cases Opened (by Channel).
  - Cases closed (by Employee).
  - Case Response Time Performance (all support channels).
  - Abandon Rates.
  - Telephone Response Time Performance.



- Case Resolution Time Performance.
  - First Contact Resolution Rates (by Employee).
  - Case Escalation rates.
  - Backlogged issues.
  - Team productivity measures.
  - Individual productivity measures.
  - Knowledgebase Article creation and reuse reports.
  - Quality metrics.
  - Customer Portal metrics (logins, self-service success, documentation downloads, articles reviewed, etc.).
- MS-Excel spreadsheet of cases opened by case id number for last twelve months, to include close date, status, severity, priority, case owner, customer, type, close reason, support channel, etc.,

#### **Customer Focus**

- Details of customer interface systems (telephone, email, web, application, social media, channel partner, etc.) with workflows to the Service Desk.
- Customer satisfaction survey questions and response rates for last twelve months.
- Customer satisfaction percentage by month for last twelve months.
- Example customer profile.
- MS-Excel spreadsheet of customer satisfaction results for last twelve months.
- MS-Excel spreadsheet of annual license revenue per client.

#### **Employee Development**

- Service Desk skills matrix.
- Service Desk training records for last twelve months.
- Employee retention for previous twelve months by voluntary (internal or external) vs. involuntary.
- Details of work/life balance program, stress management training.

#### **Supportability Review**

- Current list of Service Desk requirements for product supportability.
- Development report for supportability for last twelve months.

#### **Change Management Process**

- Process documentation.
- List of changes requested for last twelve months and results.