The Big Picture

We have our EasyVista application configuration items complete, including Incident Catalog (“categories), Request Catalog, LANDesk and AD fields to sync, Working Hours, Priority Definitions, Working Hours by Area, Departments, and Locations. I will send out our final values later today to all stakeholders and implementation team members.

This Week

✓ Rob Farrington, our EasyVista consultant, will be on-site this week to help Mark & Brian with Request Catalog import, as well as SLA training.
✓ Rob will give Dave Burchell and I a final, detailed demo of Service Apps.
✓ As you may recall, ServiceApps is EasyVista’s “codeless” recommended method for creating a user-friendly self-service portal. Previous demonstrations have been disappointing. Rob expects to show us a more capable product today.
✓ Until the Service Apps issue is resolved the self-service portal is at risk of either not being implemented in this phase, or of being a more basic version.
✓ ITIL Foundations class Tuesday through Thursday, 8:30 – 4:30 Harper 2060.
✓ Jeremy and I have been brainstorming the training we will conduct in July. Invitations will be sent out by this Wednesday. As of today we’re looking at five classes, depending on role:
  ▪ #1 Team Up for Stellar Customer Experience: How We Will Work Together [1½ hours]
    ▪ On the next page you’ll find a detailed outline of class #1 for your review.
    ▪ Jeremy sent out invites on Friday.
    ▪ Dates/times are: 7/1 @ 1:30, 7/7 @ 9:30 & 2:30, 7/8 @ 9:30 & 2:30
    ▪ If you or your people did not get the invite please let Jeremy know.
  ▪ #2 EasyVista Advanced Training (for Tier 1) [4 hours]
    ▪ “Hands on” for Tier 1 support (DoIT and SPAHP) or anyone needing an in-depth understanding of how to manage the Incident and Request lifecycle.
    ▪ Class size is limited to about 12 people as each person will have a PC to actually work tickets.
    ▪ Dates/times are: 7/21 @ 8:30, 7/22 @ 8:30, 7/23 @ 8:30
  ▪ #3 EasyVista Standard Training (for Tier 2) [2 hours]
    ▪ “Hands on” for Tier 2 support or anyone working incidents or requests in EasyVista.
    ▪ Class size is limited to about 12 people as each person will have a PC to actually work tickets.
    ▪ Dates/times are: 7/21 @ 1:30, 7/22 @ 1:30, 7/23 @ 1:30
  ▪ #4 Management Insight and Oversight: Using Metrics to Your Advantage [2 hours]
    ▪ This class will occur in August once we have accumulated some production metrics.
  ▪ #5 Drill It and DoIT: Stress Reduction for Front Line Staff [2 hours]
    ▪ “Hands on” for Tier 1 support or anyone taking “live” calls concerned about knowing the tool well enough to feel comfortable when “under the gun.”
    ▪ Class size is limited to about 12 people as each person will have a PC to actually work tickets.
    ▪ Dates/times are: 7/27 @ 8:30, 7/28 @ 8:30 & 1:30

REPORTS AND DASHBOARD

Our EasyVista consultant, Rob, will hold a session on “Reporting & Dashboards: What Can You Expect?”

Time: this Friday, June 19 @ 8:30-12:30

This session is for management and anyone who wants a detailed demonstration of the reports EasyVista will offer out-of-the-box, as well as how they can be customized. Let me know if you aren’t registered.
Outline for “Team Up for Stellar Customer Experience: How We Will Work Together”
(Class is scheduled for 90 minutes.)

Table of Contents

Improving Customer Experience (15 Min.) .................................................................................................... 4
Opening Remarks (5 Min.) .......................................................................................................................... 4
ITIL MAPS TO EASYVISTA (3 Min.) .......................................................................................................... 4
Scope of What Is Being Done (1 Min.) ......................................................................................................... 4
Phased Approach (2 Min.) ......................................................................................................................... 4
OWNERSHIP AND ACCOUNTABILITY (18 Min.) .......................................................................................... 4
We Are Implementing This Change (3 Min.) ............................................................................................... 4
Tier 1 (Duties within the Lifecycle) (2 Min.) ............................................................................................. 4
Tier 1 Responsibilities (4 Min.) .................................................................................................................. 4
Tier 2 (Duties within the Lifecycle) (5 Min.) ............................................................................................. 5
Management Responsibilities (4 Min.) ...................................................................................................... 5
SLA’S, ESCALATION AND NOTIFICATION (5 Min.) ................................................................................ 5
Service Level Agreements (SLAs) (5 Min.) ................................................................................................. 5
INCIDENT/REQUEST LIFECYCLE (40 Min.) ............................................................................................ 5
Incident and Request Lifecycle (15 Min.) ................................................................................................... 5

I=Identify (4 Min.) ................................................................................................................................... 5
L=Log (2 Min.) ......................................................................................................................................... 6
C=Categorize (10 Min.) ............................................................................................................................ 6
P=Prioritize (8 Min.) .................................................................................................................................. 7
I=Initial Diagnosis (3 Min.) ...................................................................................................................... 7
I=Investigation and Diagnosis (After Triage) – Start Tier 2 Involvement (5 Min.) ................................. 7
R=Resolution and Recovery (3 Min.) ......................................................................................................... 8
C=Closure of Ticket (4 Min.) ..................................................................................................................... 8
CONCLUSION ............................................................................................................................................. 8
Improving Customer Experience (15 Min.)

Opening Remarks (5 Min.)
- Training is required
- Accuracy is critical
- Attention to detail is critical
- Procedural adherence is required
- Is this a part of performance plan?

Pop Quiz (6 Questions) (10 min)

ITIL MAPS TO EASYVISTA (3 Min.)

Scope of What Is Being Done (1 Min.)
Insert ITIL Scope Image

Phased Approach (2 Min.)
Insert Phases Images

OWNERSHIP AND ACCOUNTABILITY (18 Min.)

We Are Implementing This Change (3 Min.)
- Clearly Defined Ownership
  - Keeps us from “stepping on each other’s toes”, and
  - Keeps tickets from “falling between the cracks”.
- Accountability Improves Quality
  - Which supports the number 1 reason for this project: Improving customer experience.
  - Accountability also ensures we each know what we are and are not responsible for, giving us the freedom to focus on our own work without having to worry that something won’t get done.

Tier 1 (Duties within the Lifecycle) (2 Min.)
- Is responsible for initial and final communication with customer
- Responsible for any request for status updates from customer
- Ultimately Responsible for customer agreeing that the ticket was resolved

Insert flowchart here

Tier 1 Responsibilities (4 Min.)
- Responsible for assuring that all assignments have been worked within SLAs
  - Will get alerts if breach is imminent
  - Will escalate to get someone to work assignment – May require phone call to Tier 2 rep first and if not able to contact may escalate to manager
- Ensuring customer is agrees that ticket has been resolved
  - If no, reassign to tier 2
  - If yes, send survey
Tier 2 (Duties within the Lifecycle) (5 Min.)
- Tier 2 Responsible for accurate root cause and
- Tier 2 is responsible for accurate description of the resolution.
- Tier 2 responsible for confirming that ticket type – incident vs. request is correct.
- Tier 2 is responsible for flagging resolution for knowledgebase
- Tier 2 is responsible for reassigning tasks as needed – through categories
- Tier 1 is still primary point of contact - Tier 2 may contact customer as needed

Management Responsibilities (4 Min.)
- Metrics are data in,
- Dashboard and reports are data out – Dashboards are short term summarized data (Typically less than one day), reports are detailed and can span extended periods of time (Typically greater than one day).
- Allocating resources based on reports
- Trend analysis – are changes over time
- Handling Escalation events
- Staff sizing and allocation
- Budget forecasting
- Staff Performance (KPI)
  - If management want to see the reports, then management is responsible for ensuring that their staff is entering it in correctly.

SLA’S, ESCALATION AND NOTIFICATION (5 Min.)

Service Level Agreements (SLAs) (5 Min.)
- SLA in force, not OLAs at this time.
- SLAs based on priority and category (category will most likely be in form of handout) (insert and show table for urgency and impact and priority – priority table will show SLAs)
- SLAs Breaches drive escalations (Explain briefly what an SLA Breach is, then show what an escalation is. SLA has been exceeded, show as percentages such as 75% of SLA)
- Notifications triggered by escalations or events, explain events and when emails are sent. (Yet to be determined when escalations or events are sent.)
- Staff performance assessed based on average SLA compliance (Management has not decided this yet.)

Note: In order to assure that tickets do not breach we will need to all work as a team and ensure that no one person is falling behind. Tier 1 has responsibility for overall ticket completion.

INCIDENT/REQUEST LIFECYCLE (40 Min.)

I=Identify (4 Min.)
- Incident
  - Incident vs. Request
  - An incident is (Use exact definition from ITIL book)
- Request
A request is (Use exact definition from ITIL book)
- No Action Needed
  - Will include “No Action Needed” calls that are not supported by DoIT (e.g. burrito call, public safety issue, facilities, etc.)
  - Identify as an “Incident” and choose “No action needed” category.
  - What if I categorize an incident as a request (or vice versa)?
    - Close incorrect ticket and associate new with old.

Discussion Question: Make question for Incident vs. Request provide examples.
- Incident – If someone calls in saying that they have just downloaded a virus and is no longer working properly. Is this an Incident or Request?
- Request – If someone calls in asking if they can order a larger monitor for one of their representatives who is not able to see well. Is this an Incident or Request?
- Burrito Call – If someone calls in wanting directions to library, is this an Incident or Request? Neither, it is a No Action Needed.

L=Log (2 Min.)
- All calls logged
  - Calls are log as incident, request, or no action needed.
  - If this is “No Action Needed” still have to be logged.
- Will use a dummy NetID for very short calls or caller hang-ups.
  - Example: Customer calls in and asks if we are open, but then realizes that you just answered and say “Oops Never mind” then hangs up.

C=Categorize (10 Min.)
- Categorization
  - Provide detailed description: Good vs. Bad Example
- Accurate Categorization vs. Manual Assignment
- EV will do auto assignments based on categories
- You may have to drill down to “child” category as not all “parent” categories can be chosen.
- Why? reduced training for new hires
  - A newly hired rep is not going to know specifically who to assign the problem to. The system will help to narrow the field down through the use of categories.

Show the list of current categories
- Using accurate Categorization vs. Manual assignment will help break the habit of using personal judgement for assignments.
- Show incident and request catalog
  - Will show Level 1, 2, and 3 incidents or requests.
  - Will show which group in charge will be assigned to each
  - Will show them the service level agreement for that category
  - Will show them the default priority for that category
Categories are important as they drive routing and reporting.

Discussion Question: It is important to note that accurate categorization is critical. If a ticket is incorrectly categorized it is possible that the wrong person or services will be directed to the person wasting not only the customers but all parties involved.

- If a person is calling in and is requesting that we look at their computer because it is not booting up properly, this is an incident.
- If a person is calling in because they need an updated version of Word installed on their computer that could be both an incident and request.
- If someone calls in and an incident ticket is generated. However, later on it is determined that further hardware needs to be purchased for the computer. The Tech simply changes the ticket from an incident to a request and the process for ordering the part continues. Is this correct? No. It is important to understand that you cannot change a ticket from incident to a request. Instead a new request ticket must be opened, and old incident ticket either remains open until it is resolved or it is sent to be closed, and the new request ticket will associate the old ticket on it.

P=Prioritize (8 Min.)
- Show verbiage and scale – (Urgency + Impact) – 1 = Priority - provide handout
- Priority is a calculated field. You cannot set it or override it directly.
- VIP List and Exception Process
  - If on VIP list priority increase by 1
- Customers are able to set “urgency” only (not ‘impact”) for self-service tickets.
- Consequences of falsely high priority,
  - Tighter SLAs (less time to work ticket)
  - Everything, including escalation can happen twice as fast. priority determines escalation procedures
  - Rule in force if a priority 1 Tim B. automatically gets notification via email.
- If the category has a default SLA or priority it can be overridden, but must be done after category selection.

I=Initial Diagnosis (3 Min.)
- “Triage”
- Strive for 1st Call Resolution (Why – increases customer satisfaction, reduce average ticket resolution time.)
- No assignment yet – still in hand of person who took call.
- Diagnosis flowchart – limited at first, built out over time, diagnosis flowchart a set of steps to quickly resolve common incidents. Flowcharts for how to do the job quickly and with best possible results.
  - Include password reset flow chart as example handout.
- Known error (Some incidents are known errors and will be found in the knowledgebase)
- If no 1st call resolution, hit “Save” and EasyVista will auto-assign based on category already selected.

I=Investigation and Diagnosis (After Triage) – Start Tier 2 Involvement (5 Min.)
- May require additional information from customer
- May require a visit
- May require re-assignments
- May require category change (This will auto reassign to appropriate team.)
• May require switching incident to request
  o Cannot simply switch from incident to request on ticket, you will need to open another or close first and open new to change,
  o Associate the old ticket to the new ticket.

R=Resolution and Recovery (3 Min.)
• Follow these steps
  1. Test and Verify Solution Worked (And do not close task until you verify solution worked)
  2. Detailed description of solution (important due to inclusion in knowledgebase)
  3. Choose a root cause (Show list of actual identified root causes ie: ID10T error. Management will be able to pull report on similar root causes to identify trending and opportunities for training)
  4. Select whether this a Knowledge Base Candidate or not?
  5. Close Task not Ticket (may have ability to do both, so need to express that tier 2 will not close tickets, only tasks.)
    Note: Tier 2 closes tasks only, tier 1 closes tickets only. Tier 1 should never close a task, instead they will contact tech and have them close their tasks.

Discussion Question: Include question on quality of notation. Detailed description of solution must be entered. Provide examples of what would be considered a good description. Get with Tom or Tabitha.

C=Closure of Ticket (4 Min.)
• Verify ticket is complete
  o resolution description filled out thoroughly
  o Proper Root cause selected
  o Category appropriate
  o Verify Tier 2 reps time is logged for all assignments.
• Close ticket to begin automated ticket closure process
• Generate automated email asking customer whether incident or request was resolved
  o If not - kick ticket back
  o If yes – may send survey
• If no customer response after 48 hours then the system will close ticket automatically.
  o Important Note: Ticket cannot be reopened once closed, start new ticket and relate to old one.
  o Important Note: Long-term requests should be closed as soon as complete and if customer discovers an issue they will open a new ticket.

  Note: Service Desk will be referred to as Tier 1, Field Techs as Tier 2

CONCLUSION