# CUSTOMER SERVICE BEST PRACTICES-WHAT FEATURES AND FUNCTIONS YOU SHOULD LOOK FOR IN CUSTOMER SERVICE SOFTWARE

Why are Customer Service Best Practices important?

What features and functions in software will help you implement best practices?

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# CUSTOMER SERVICE BEST PRACTICES-WHAT FEATURES AND FUNCTIONS YOU SHOULD LOOK FOR IN CUSTOMER SERVICE SOFTWARE

The following is a summary of Customer Service Best Practices from the following three authority sources: Customer Care Institute, Purdue University Center for Customer Driven Quality and the Service & Support Professionals Association (SSPA).

To improve, an organization must assess its current practices against those used in other organizations, or “best practices.” Simply put, a best practice is the most effective way to get something done. These practices, processes, and procedures have emerged as proven models for the majority of organizations. However, best practices are dynamic, evolving over time to adapt to changing needs. Periodically, new methods, models, and technologies arise, augmenting or replacing the existing best practice with a new one.

Customer service organizations must assess their competencies, find areas for potential improvement, and grow. A list of best practices that can be implemented and used in customer service software serves as the starting point for such an evaluation and improvement process. Use this list to reconsider what you are doing and why, and what you should be doing and when. Balance each potential change in a practice, procedure, or technology with a cost/benefit analysis.

## Customer Service Best Practice: Perform Customer Satisfaction Surveys on a Regular Basis

Customers will always let you know when they are completely dissatisfied with your service. However, daily customer satisfaction surveys performed by your call tracking software provides valuable information from a broad sampling of customers. A continuous customer satisfaction survey process improvement philosophy will drive customer satisfaction and loyalty to even higher levels. According to a 2013 Help Desk Institute Survey, 21% of their members send customer satisfaction surveys with every service request. This is an increase of 40% from the 2009 survey.

| Frequency | Response |
|---|---|
| Continuous Customer Survey Sampling | 21% |
| As Needed Customer Survey | 17% |
| Annual Customer Satisfaction Survey | 14% |
| Do Not Conduct Customer Satisfaction Surveys | 13% |
| Quarterly Customer Satisfaction Survey | 8.5% |
| Daily Customer Satisfaction Survey | 8% |
| Weekly Customer Satisfaction Survey | 8% |
| Semi-Annually Customer Satisfaction Survey | 8% |
| Monthly Customer Satisfaction Survey | 6.5% |

Source: HDI Practices Survey 2013

**IMPORTANT QUESTIONS**

- In ten seconds or less, can you measure overall customer satisfaction as follows? In ten seconds or less, can you also review survey comments made by customers?

  By Service Group
  By Analyst
  By Call Category
  By Root Cause

  Further by time:

  This morning
  Yesterday
  Last Week
  Last month

  Further by:

  Region
  Country
  Office
  Department
  Customer

***Create Your Own Customer Satisfaction Surveys or Use a Default***
This provides for creating your own customer satisfaction survey greetings, questions, answer formats and values including follow-up thank you notes. It is important to be to able to generate your own custom customer satisfaction surveys. Customer satisfaction surveys that can be set up with text, lists, text inputs and radio buttons allow for the most customization. A default survey will also help you get started right a way with surveying. An associated customer satisfaction report allows for quickly viewing the survey results.

***Customer Satisfaction Rating Alerts***
This provides for setting minimum levels of customer satisfaction ratings that trigger alert notifications if levels are not achieved. This allows quick remediation.

***Customer Satisfaction Survey Frequency and Survey Exceptions***
This provides the capability to survey each customer every X service requests, but no more than Y service requests over Z time interval. System Administrators should be able to place some customers on a survey exception list so that they do not receive surveys. Some customers who frequently use the customer service organization many not want to complete a survey each time they call customer service.

***Personalized Customer Satisfaction Surveys***
This provides the capability to include a digital photograph of the person who closed the service request along with the customer satisfaction survey that is sent via email. This allows customers can view a picture of the person that resolved their problem. This helps connect customers to the customer service department and puts a “face” on the people in the department.

***Choice of Customer Satisfaction Survey Delivery Method***
This provides an option for the customer satisfaction survey to be sent either in an independent “customer satisfaction survey” email or integrated with the standard close service request email notification. The customer satisfaction survey will display as a nice sharp looking HTML document directly in the email. This will increase customer satisfaction survey response rates.

***Customer Satisfaction Survey Alerts- “Please call me”***
This provides a “check box” that the customer can check if they would like a customer service manager to call them. When checked, a manager is immediately notified giving them a “heads-up” that a customer wants to speak with them. This allows for a written record and an opportunity to more closely communicate and meet the needs of your customers.

## Customer Service Best Practice: Implement a Web-Based Knowledge Base Tool

In conjunction with using a web-based customer service software system, using a fully integrated web-based knowledge base software tool is a very important customer service best practice. The greatest asset a service organization has is the knowledge of the staff. When an employee leaves the organization, they take all that knowledge with them. By encouraging and rewarding customers to document their knowledge, in a centralized knowledge base software system, it becomes available for all the staff to leverage. Independent research supports that a knowledge base will decrease call handle time, talk time, call escalation percentages, employee turnover, agent training time and increases first call resolution rates. A knowledge base software application will also increase consistency in answers and overall customer satisfaction.

When customers use a knowledge base software self-help tool, it reduces repeat calls to the Customer Service organization. Using a customer accessible self-help portal will reduce calls by increasing call avoidance and is a great way for your support organization to save costs. In the 2007 Help Desk Institute Practices Survey, 48% of respondents use a web portal knowledge base system. When companies employ web-based self-help technologies, 74.5% of them use knowledge base search tools!

| Technology | Response |
|---|---|
| Knowledge base search tools | 74.5% |
| FAQ's | 72% |
| Self-diagnostic/Self-healing | 38% |
| Other | 22% |

Source: HDI Practices Survey 2013

***What benefits can companies expect from a Knowledge Base and Self-Help Knowledge Portal?***

Some benefits of a Knowledge Base software system correlate directly to bottom-line savings, while others are more difficult to quantify. In today's information-driven economy, companies uncover the most opportunities — and ultimately derive the most value — from intellectual rather than physical assets. To get the most value from a company's intellectual assets, Knowledge Management practitioners maintain that knowledge must be shared and serve as the foundation for collaboration. Yet better collaboration is not an end in itself; without an overarching business context, a Knowledge Base is meaningless at best and harmful at worst. Consequently, an effective Knowledge Base software system should help a company do one or more of the following:

- Foster innovation by encouraging the free flow of ideas
- Improve customer service by streamlining response time
- Boost revenues by getting products and services to market faster

- Enhance employee retention rates by recognizing the value of customers' knowledge and rewarding them for it
- Streamline operations and reduce costs by eliminating redundant or unnecessary processes
- Increases customer satisfaction since a knowledge base portal is available 24 hours/day

Source: CIO Magazine. The ABCs of Knowledge Management, Megan Santosus & John Sermacz

**IMPORTANT QUESTIONS**

- In ten seconds or less, can you determine which Agents are generating knowledge records and at a very granular level can you determine if this knowledge is solving problems?
- Does your firm provide valuable incentives to reward Agents for building and maintaining a high quality knowledge base?
- In ten seconds or less, can you determine what categories of knowledge customers need?
- In ten seconds or less, can you determine the quality of knowledge by user ratings and how often knowledge records were used to solve problems?
- In ten seconds or less, can you determine if an increase in knowledge records is causing an associated increase in First Contact Resolution?

***FAQ and Most Frequently Used***

These allow both agents and customers to leverage a list of common questions and answers in the knowledge base software application. An FAQ can easily be set-up by specifically designating that a knowledge base record is included in the FAQ listing. A Most Frequently Used listing of knowledge base records will leverage the knowledge base and help customers and Agents to quickly find answers.

***Problem Solving Score- Knowledge Base Record***

When a knowledge base record is used, a "Problem Solving Score" is incremented. The search engine utilizes these ratings to prioritize subsequent knowledge base search results. Reports use the “Problem Solving Score” to indicate which knowledge base records have the highest value and which may need improvement. A knowledge base software system should learn and get “smarter” over time.

***User Rating Score-Knowledge Base Record***
An Agent can rate knowledge base records each time they are used. The search engine utilizes these user ratings to improve subsequent knowledge base search results. Reports use knowledge base record ratings to indicate which records have the highest value and which may need improvement. A knowledge base software system should learn and get “smarter” over time.

***Knowledge Base Accepts Attachments and Screen Shots***
Sometimes a picture is worth a thousand words. With a good knowledge base software system, files and screen shots can be attached to knowledge base records for further documentation. Attachments that are audio and video presentations of typical “How To” questions are excellent examples. The files are indexed by the knowledge base search engine and become part of the knowledge base software system.

***Import Third Party Knowledge Bases for Agent and Customer Self-Help***
This provides the ability to purchase knowledge bases from third party vendors and import for use in your own knowledge base software system.

***Assign security levels to knowledge records.***
This provides the ability to assign a security level to knowledge base records, agents and customers. Accordingly, agents and customers can only view knowledge base records designated with the matching security level in their profile.

***Knowledge Base Approval Process***
All new knowledge base records must go through an approval process.

***"Contact Me" option***
After a customer reviews knowledge base records in a customer service self-help portal, if no records answer the query, the customer can request someone contact them. By clicking a “Contact Me” hyperlink, the knowledge base software application automatically creates a service request with the search criteria already tried by the customer. This service request also documents the possible need for new knowledge base information to fill voids.

***Automatic Customer Profile Creation***
When a new customer requests someone contact them, besides creating a service request, the knowledge base software application automatically creates a new customer profile.

**Capability to Designate Knowledge Base Records as "HOT" Knowledge Base Records Bypassing Approval**
Some knowledge base records need to be available immediately without going through the approval process. A knowledge proposer can designate any record as "HOT." The knowledge base record is then immediately available for others to utilize. Later, if the knowledge base record is approved, the "HOT" designation can be removed.

***Assign a Scope to a Knowledge Base Record***
Record Scope is a field used for grouping knowledge base records for a single service desk, multiple service desks and parent/child companies.

***Knowledge Base Record Redundancy Avoidance***
When knowledge base records are initially proposed and also during the approval process, the knowledge base software automatically searches all existing approved knowledge base records to identify possible redundancies. This allows the knowledge bas record proposer or approver to consider these possible redundancies.

***Knowledge Base Record Spelling and Grammar Checker***
This provides for a spelling check on all proposed knowledge base records to maintain the usability of the knowledge base software system.

***Knowledge Base Record Action Notification***
As knowledge base records moves through the approval process, designated approvers are automatically notified via email.

***Knowledge Base Source Tracking***
Defines the source of the knowledge base record such as a service group and agent. This is used to measure who is creating knowledge base records.

***Knowledge Base Record History Field***
A knowledge record history field keeps a permanent record of all changes to the record as well as who did the change as well as the date and time of the change.

***Search Scope can be Widened or Narrowed***
If the knowledge base search results are not satisfactory, you can widen or narrow the search scope to generate new knowledge base records without having to start the search from the beginning.

***Login Required-Self-Service Customer Service Portal Access***

Login required gives the flexibility to store sensitive knowledge in a knowledge base that requires agent and customers to present a user ID and password.

**No Login Required- Self-Service Customer Service Portal Access or Intranet Restricted Access**
No login allows your customers to access your knowledge base without the hassle of having to log in. Access from a private Intranet page restricts access to only those authorized.

***Search Knowledge Base from any Screen***
Simply click a hyperlink that will take you directly to the knowledge base software application.

***Create Knowledge Base Articles from any Screen***
Useful knowledge can be thought of by Agents at any time especially when they are searching for answers or resolving a service request.

***Search the Knowledge Base your own way***
You can enter your question in the knowledge base natural language search engine by using normal conversational questions. Alternatively, the capability to use a Boolean search engine and enter specific search criteria such as (1) Include all these words or phrases, (2) include at least one of these words or phrases, (3) exclude these words or phrases, (4) search by record number. Optionally, you can select a category from a drop down menu.

## Knowledge Base Natural Language Search, Boolean or Key Word Search

***Natural Language Search & Knowledge Bases***
A natural language search engine evaluates words based upon their meaning and the relative positioning to each other. For example, an exact match of a phrase would have a higher relevancy score than phrases with all the same words in different order. Good knowledge base search engines have a database of synonyms, commonly misspelled words and a thesaurus. They also perform root word stemming on knowledge base searches which take the root word and searches on the variations of that word such as adding “s” or “ing”, etc. The ability to interpret and differentiate between words that sound alike or have similar letter patterns is important. These knowledge base software functions help to better interpret the search input in order to generate higher quality search output.

***Boolean or Key Word Search***

- **Boolean operators**. You can refine your search with words such as AND, OR, and NOT.

- **Keyword search**. If you only know a few key words, you can begin your search with these and then refine to get closer to your goal.

Knowledge base records in a search result should be clear and concise. A search ranking score from either of the search approaches indicates the probably that this result is the answer based on your search criteria.

***Tabs for Easy Viewing Knowledge Base Results***
The basic knowledge view displays a summary of the related knowledge. Additional Tabs can take you do different views including knowledge base screen shots and attachments

***Easy Copy of Knowledge Base Content into Customer Service Software System***
Clicking a simple hyperlink to enter service request resolution information into the customer service call tracking software system will save data entry time and improves documentation. The call tracking software system should also track if you copy the knowledge base record into the service request. If this occurs, then there should be an increase in value of the knowledge base record since it helped solve a problem. This will also allow you to measure and track which knowledge base records are used.

***Emailing a Knowledge Base Record to Customer***
Clicking a simple hyperlink to send a customer the appropriate service request resolution will save agents time.

***Simple Customer Interface to Knowledge Base***
Customers can access knowledge base records from a customer interface via the Internet with a very simple user interface.

## Knowledge Base Record Creation Options

- **Proactive Method** Authors can create knowledge and then place it through a validation process before it is available to all support personnel.

- **Manual Method** Subject Matter Experts (SME) create knowledge from their experience.

- **Reactive Method** An agent or a customer proposes knowledge when in the process of opening or closing a service request.

***Knowledge Base Record History***
The knowledge base record history field keeps track of all changes in a diary field. For example, the date, time, who created the record, who approved the record, status changes, etc. are all recorded in the knowledge base record history field.

## Customer Service Best Practice: Implement a Web-Based Knowledge Base Tool with Real-time Reports, Dashboards, Metrics and Business Analytics

***Knowledge Base Value Report***
Report allows you to evaluate the quality of knowledge base records proposed by people in your organization. It includes information such as "Problem Solving Score," "Average Problem Solving Score," and "Average User Rating" for knowledge base records. .

***Knowledge Base Usage Report***
Report allows you to evaluate the quality of knowledge records based upon the "Problem Solving Score" and the "User Rating" of knowledge records.

***First Contact Resolution to Approved Knowledge***
This report allows you to determine if, as you add knowledge base records, there is an increase in the First Contact Resolution percent.

***Knowledge Base Status Report***
Report allows you to search proposed knowledge records by any status, scope or category. Drill down capability allows you to directly access a knowledge base record.

Report should offer many query options such as (1) Categories, (2) Statuses, (3) Knowledge Users, (4) Scope, (5) Security Levels, (6) Approvers, (7) Not Last Used Within x Months and/or (8) Not Last Modified Within x Months.

***Knowledge Base Status Report & Approval Work Flow Process***
The Subject Matter Experts run this report for their respective category. It lists all knowledge base records for approval.

***My Knowledge Base Status Report***
Report is for each person that has proposed knowledge into the knowledge base software application. It lists the status of each knowledge base record. Sometimes Subject Matter Experts and Knowledge Base Approvers will ask the knowledge proposer for additional information.

***Knowledge Base Statistics Report***
This report provides the following information:

- The number of knowledge base records at each stage of workflow
- The age of each knowledge base record
- The number of knowledge base solutions rejected at various stages of workflow
- The number of knowledge base records that were proposed, but rejected because of redundancy

***Knowledge Base Records by Creator***
This report helps you to understand which knowledge creators are creating high value knowledge. This report displays all the status of knowledge records by each user. It also displays the numbers and percents of all the different status of knowledge base records at a given time. The report tracks:

- The number of knowledge base records each user has proposed.
- The number knowledge base records each user has had rejected.
- The number of knowledge base records approved. For knowledge base records approved, the report will display the problem solving score and the user rating.

## Customer Service Best Practice: Implement Service Request Automation Processes in your Customer Service Software

There are many good customer service best practices to assist your staff to quickly process and resolve customer issues.

***Customer Service Software Accepts Attachments and Screen Shots***
Sometimes a picture is worth a thousand words. Files and screen shots can be attached to service requests for further documentation.

***Customer Service Software Integration with Remote Control Software***
The ability to view the customer's screen if a technical product shortens diagnostics and improves training.

***Quick Customer History***
When creating a new ticket, immediate view of customer's current ticket history can give insight into current problem and it may avoid duplicate tickets.

***Quick Resolutions***
User configured resolution text that, when selected, automatically populates resolution fields.

***Automate Email-to-Service request Creation***
This provides a function that allows customers to use their existing email program to submit service requests to the support organization and have the customer service software system automatically create a service request.

This can save a significant amount of time and money for the Customer Service organization. The customer receives an email confirmation just as if they opened a service request by speaking with an Agent on the telephone.

***Automatic Reminder of Standard Operating Procedures and Questions to Ask Customers***
This allows the customer service software system Administrator to configure and attach procedures and questions to the service request categories. Selecting a service request category prompts the agent user with the Standard Operating Procedure and/or questions to ask.

Reminding agents of standard operating procedures to follow and/or questions to ask the customer helps create a very well qualified service request for the 2$^{nd}$ level to begin working on if the customer service agent is not able to solve the problem.

***Parent/Child Service requests***
This provides for the capability to open up “service requests within service requests”. Cross-functional projects can be managed in this manner. If there are many tasks that have to be tracked in one service request, then the Parent/Child service request is an excellent tool to use. It is an especially useful tool if multiple people have to work on the service request at the same time.

All Child service requests must be closed before the Parent service request can be closed. A report to track the status of Parent/Child service requests is important.

***Multiple Independent Service Desks within Customer Service Software System***
This provides the capability to have multiple independent service desks within the customer service software system. This is important when used within a single company where many different departments or divisions can share a single underlying database of customers. All service desks are independent entities. Each service desk cannot view service requests from any other service desk. The following are examples of departments within a company that may want to have their own service desk: Customer Service, Information Technology, Human Resources, Accounting, Marketing, Facilities, Operation and Manufacturing. All these departments can share the same underlying database of customers, but have their own unique service desk configuration. When many departments use the same customer service software system, this provides great economies of scale and saves the company money.

***Parent/Child Quick Service Requests for Major High Volume Incidents***
This provides the Customer Service organization with the capability to create multiple service requests for the same event with the same information. This is for when there is a major outage and the Customer Service department is flooded with calls. This is the time when it is critical that the Customer Service department be able to record all contacts about this event so that the true impact of major outages are reported. When a service request is closed, it is possible to close all the service requests.

***Complete Audit Trail of all Service Requests and Knowledge Base Records***
All changes made to a service request are automatically recorded in the service request History field. When the service group, assignee, problem description, or any other field is changed, this change is captured along with the date, time and the person making the changes. This ensures complete accountability.

***Quick Service Requests***
Quick Service requests are predefined service requests that are set-up in advance. An example of one is “Status Request”. In fact, industry numbers indicate that as much as 30% of Customer Service contacts are for status requests. It is critical that the Customer Service be able to quickly record all such inquiries so that the true workload of the Customer Service can be evaluated and that processes can be put in place to reduce these expensive routine requests.

### *Service Request On-Hold Clock*

A function that allows assignees to track time waiting for customers to get back to them with information. The System automatically calculates how long ticket was "on hold" in case of Service Level Agreement breach.

Agents can keep track of the amount of time that they are not able to work on a service request because of circumstances beyond their control. A few examples: waiting on a customer for information, waiting for a part from a vendor, etc. Each time the service request is placed “on hold” or “off-of-hold”, a message is added to the service request history and the cumulative time is calculated and placed in the service request. Also, to place a service request “on hold”, requiring a reason is important

### *Create Multiple Service requests at Same Time*

This provides “hot” keys and mouse “clicks” to make it easy to open multiple service requests at the same time without having to complete an existing service request. This is useful when the Customer Service phones keep ringing and it is important to capture the calls quickly.

## Customer Service Best Practice: Use the Customer Service Software System to Increase Communications With Agents and Customers

### *Marquee Scrolling Emergency Messages*

This is a message that is continuously scrolled in the customer service software application. This is so that all logged in users can see this information. For example, a typical Marquee Message might be used to communicate hold times to Agents. When you create a Marquee message, there should be an option to also send a page and email to a predefined list of users with the description of the Marquee message. This is a benefit to management who are typically not logged into the customer service system.

### *Email Customers*

With the click of a check box, you can designate that a specific service request note should be emailed to a customer. This can be used as a way to notify customers about some action they need to take.

### *Data Record Lock Notification*

If a service request is already in the process of being edited by an agent and then a second person tries to edit that service request, that second person will receive a warning that the service request is temporarily locked.

***Assignee Alert Pop-up***
This provides that an assignee of a new service request can be automatically notified by a pop-up message advising them that they have a new service request. This saves time because they do not have to run a report or look at their service request queue. Also, within the pop-up notification is a hyperlink that can take them directly to the service request.

***Broadcast Messages***
This allows authorized individuals to post a message in the system that can be seen by all selected agents in specific service groups. Broadcast messages are presented to users when they log in. This is a convenient communications tool to keep service groups informed of important information.

***Automated Service request Escalation***
Based on SLA response time settings, service requests are automatically escalated to designated persons or groups. Email and/or Page notifications are also automatically sent indicating this escalation. This ensures that SLA contracts with your customers are honored.

***Chat***
Customers have the ability open a chat session with the customer service from the customer self-service web portal.

***Hot Keys & Keyboard Shortcuts***
Many “hot” keys and other shortcuts are available to help users quickly move from one task to another.

## Customer Service Best Practice: Implement a Customer Self-Help Portal accessible 24 hours/day

The cost per customer service contact method varies with the type of submit method.

| Method | Cost |
|---|---|
| Self Service | $5 |
| Web | $8 |
| Email | $16 |
| Phone | $25 |

Source: HDI and Meta Group

Allowing customers to access a self-help portal to resolve their own issues, when appropriate, or create their own service requests can save your organization a significant amount of money. A web self-service knowledge base and self-service customer service software system may be an alternative for weekends or after business hours when the volume of calls is too low to justify staffing the customer service.

***Easy Web Self-Service Access***
For ease-of-use and simplicity the web base self-service access should have a very limited number of functions that customers can perform: (1) Create new service request, (2) View current service requests, (3) Knowledge base search, (4) View hot issues, (5) View an FAQ, and (6) Change Password.

## Customer Service Best Practice: Use Real-Time Customer Service Reports, Dashboards, Metrics and Analytics

That which is not measured, cannot be managed.

*The concept of improvement has, at its heart, the act of measurement.*

*All business improvement programs, from Six Sigma to Balanced Scorecard to kaizen, rely on metrics definition and monitoring not only to quantify success, but also to drive improvement. Companies have found that the implementation of a metrics program leads to improvement in and of itself, even without being accompanied by any activities specifically designed to produce improvement. The reasons for this are still being debated, but studies have shown that people will change their behaviors in order to improve measurements, regardless of whether there is any incentive for doing so.*

*Char LaBounty, The Art of Performance Management, Senior Fellow, Customer Service Institute*

## Customer Service Best Practice: Perform Root Cause Analysis everyday and determine why problems occur.

IMPORTANT QUESTIONS

- In one second and with one click, can every Agent select a mandatory Root Cause field from a list of highly relevant Root Cause categories before a Service request is closed?
- In ten seconds or less, can every Agent enter a required problem resolution before a service request is closed?
- In ten seconds or less, can you determine which Agents are not consistently documenting service requests with meaningful problem resolutions?
- In ten seconds or less, can you perform Root Cause Analysis at the end of each day before going home? In ten seconds or less, can you send this Root Cause Analysis to three other people?
- Can you identify at least three actions that you can take the next day to help reduce call volume? Bonus points if you can find nine actions to help reduce call volume the next day and delegate three actions to two other people who will take ownership.
- In thirty seconds or less, can every Agent tell you the difference between a Root Cause and the associated problem description, problem category and problem resolution?

## Customer Service Best Practice: Implement Service Level Agreements Linked to Impact on Firm Revenue

IMPORTANT QUESTIONS

- In three seconds or less, can each of your Agent categorize a service request by severity level based upon the impact to the customer?

- In ten seconds or less, can you measure Service Level Agreement compliance (Respond and Resolve) as follows?

    This morning
    Yesterday
    Last Week
    Last month

        Further by:

        Region
        Country
        Office
        Department
        Customer

            Further by:

            Severity Level
            Creator
            Last Assignee

- In ten seconds or less, can you analyze Service Level Agreement compliance over a trend line?

- In ten seconds or less, can you perform Root Cause Analysis on service requests out of SLA compliance at the end of each day before going home? In ten seconds or less, can you send this SLA Root Cause Analysis to three other people?

- Can you identify at least three actions that you can take the next day to help increase SLA compliance? Bonus points if you can find nine actions to help increase SLA compliance the next day and delegate three actions to two other people who will take ownership.

***Predefined & Customizable Customer Service Reports***
Predefined and customizable customer service reports provide metrics, trends and graphical representations of your customer service organization's performance.

***First Call Resolution Customer Service Report***
This customer service report tracks how long it takes to close first call and non-first call service requests. This time duration is measured from the time the customer profile is retrieved until the time that "Save" is clicked. The customer service report not only assists in measuring customer service analyst efficiency, but also helps to measure the organizations cost efficiency. Industry sources report that cases closed at first level cost between $15 and $30 each while second level cost between $75 and $250 each (Meta Group and Help Desk Institute). You should calculate your own cost/case for your Customer Service organization and determine your financial goals.

***First Call Trend Customer Service Report***
This is a trend customer service report showing the percentage of total service requests resolved by the Customer Service over time. With this trend report, you are able to see your progress toward your goals.

***SLA Compliance Customer Service Report***
This customer service report provides the ability to see SLA compliance from the perspective of Service Groups, Agents or Customers. For example, a particularly challenging customer may complain that the Customer Service organization is not providing an adequate level of service. This report will show you exactly how the Customer Service organization performed over time with this specific customer.

***SLA Compliance Trends Customer Service Report***
This customer service report shows SLA compliance over a period of time. Managing trends toward a higher goal can dramatically increase customer satisfaction.

***Root Cause Summary Customer Service Report***
When you have defined Root Cause codes and applied these to each closed service request, then the Root Cause customer service report can show you what is causing your customers to

contact the Customer Service. When used as part of a cost containment/case reduction strategy, this customer service report will show you what problem to address first. After the systemic process corrections have been made, this customer service report will show how effective your corrective actions have been.

***Customer Satisfaction Survey Customer Service Report***
This report shows the results of customer satisfaction surveys.

***Customer Satisfaction Trends Customer Service Report***
This customer service report shows the results of the customer satisfaction surveys in the form of a trend report. This is very useful when used in conjunction with the SLA Compliance customer service report to demonstrate the level of service provided and the level of customer satisfaction your team is delivering to your customers.

***Service Request Category Bar Chart Customer Service Report***
It is inefficient to have service request categories that are not used. First, it slows down the processing of new service requests. Second, it leads to improper categorization. This customer service report displays a list of all categories with the frequency of use. At least once a quarter this customer service report should be run to view the category use distribution. You can then disable categories used infrequently. Frequently used categories can be used in conjunction with a Root Cause customer service report for performance improvement initiatives.

***Service Request Category Trends Customer Service Report***
This report along with the Category Bar Chart customer service report provides a more detailed picture of category usage. For optimal use, you can select a single category for detailed analysis and run the report for a year. It will show you usage by month for your date range. The trend line may give you insight into problems that need further investigation.

***Open & Closed Service Requests Customer Service Report***
This is a powerful customer service report that can be used to identify and plan workload. This customer service report will help you determine if your scheduling throughout the day is appropriate for the call volume and if your total staffing is adequate for any given call load.

***Processing Work Load Customer Service Report***
In this report, you can see how many different kinds of submit methods (Phone, Email, Web, etc.) are used for any date range and the time of day selected. You can also see the length of time it takes to process and resolve calls. This is a valuable customer service report because

the workload of the customer service organization is not adequately represented via your ACD reports since the time to process and resolve calls is not captured.

***Processing Work Load-Off Hours Customer Service Report***
In reality, the customer service organization may not work an eight-hour shift. Their expertise may be needed at any time. With an Off Hours customer service report so that you can track how many cases are being resolved after normal hours, what hour it was resolved and by the submit method. This report can assist you in your staffing analysis.

***Re-Opened Service Requests Customer Service Report***
Customer Service Best Practices dictate that a service request should not be closed unless the customer is satisfied with the service. Also, if a customer calls the Customer Service organization to say that the work done did not fix their problem, then the service request should be re-opened. The Re-Opened Service Requests customer service report gives you a listing by severity level of the number of service requests re-opened for the date range selected.

***Submit Method Trends Customer Service Report***
This report customer service report displays metrics for the total for each type of submit methods (Phone, Email, Web, etc.) with the percentage of the total and a bar chart of the volumes by day.

***Service Request Count Customer Service Report***
This customer service report provides multiple methods to view how service requests are created and resolved: service request Count by Assignee, by Creator, by Location and by Service Group.

***Service Request Frequency Customer Service Report***
This customer service report helps you pinpoint potential problems. For example, you might want to select a location and want to see the service request volume from the top twenty-five customers. This would allow your service department at that location to review all the cases from the most frequently calling customers and create a strategy for reducing the number of contacts. For example, this might mean rebuilding their computer, replacing their computer or provide specialized training. By running this report on a regular basis, you can obtain the information and apply it to an on-going improvement program.

***Closed Service Requests Report Customer Service Report***
This customer service report allows you to pick a date range, service group(s), region(s) and time of day and whether you want to see the chart hourly, daily, monthly or yearly. The chart will give you a great visual trend of the number of service requests closed for the parameters you selected.

***Closed Quick Service Requests-Major High Volume Incidents***
This function provides the customer service organization with the capability to create multiple service requests for the same event with the same information. This customer service report allows you to enter a date range, service group(s), location(s) and report on the impact of these major outages.

Over time, this customer service report will give you some insight into the stability of your infrastructure.

***Escalation Statistics Customer Service Report***
Escalations occur when a case is not handled within the times you set for response or resolution according to your Service Level Agreements. The goal is to minimize escalations. This is particularly important for high severity level service requests. This customer service report allows you to monitor individuals, service groups, or customer locations for escalation performance. This report can also help you to monitor all situations and intervene proactively to minimize escalations.

***Escalation Trends Customer Service Report***
Escalations do occur for various reasons, but it is the trend over time that is more important to measure because it reflects underlying problems.

***Current Escalations Customer Service Report***
This report allows you to see service requests that are currently in escalation by service group, assignee and severity level. The report also helps you plan and balance your workload.

***Customer History Customer Service Report***
When a support person is creating a service request or is in the process of working on a service request, it is helpful to know if this problem has occurred before or if there has been any other circumstance that may have lead to the current situation.

## Customer Service Best Practices: Use Real-time Reporting Features that Decrease Time Required to Prepare Reports

***Customized to User***
Provides for all customer service reports with date ranges that take into account the logged-in Agent's date and time zone.

***Real-time Reports Automatically Emailed***
All Agents can set up automated email report delivery without having to log in and run the reports.

***My Customer Service Reports Section***
This provides a Reports section that allows you to place the reports you most frequently use at the top of this page under, "My Reports".

***Report Data Downloads in Excel and PDF Formats***
Provides added functionality to download the customer service report data into Microsoft Excel format. The data can be further analyzed in your own format. Help desk reports can be converted into a PDF format and instantly be emailed to one or more people.

***Customer Service Reporting by Regions and Locations***
Provides for the running of reports for specific region(s) and all locations linked to that region. This makes it easy for companies with worldwide locations to run reports for any specific location or region.

***Saved Customer Service Report Settings***
Provides that all Report settings can be saved and used as defaults for the next time the Report is run. This saves time and helps in replicating customer service reports with common selection criteria.

***Customer Service Dashboard on Management Home Page***
Provides a special Home page for customer service supervisors and managers. This contains summary reports on the health of the customer service organization.

# ABOUT GIVA

Founded in 1999, Giva was among the first to provide a suite of help desk and customer service/call center applications architected for the cloud.

Now, with hundreds of customer driven releases, the Giva Service Management™ Suite delivers an intuitive, easy-to-use design that can be deployed in just days and requires only one hour of training. Giva's robust, fast and painless reporting/analytics/KPIs quickly measure team productivity, responsiveness and customer satisfaction resulting in faster and higher quality decision-making. Customization and configuration are all point and click with no programming or consultants required to deliver a substantially lower total cost of ownership.

Giva is a private company headquartered in Santa Clara, California serving delighted customers worldwide.