

Best Practices for Measuring Help Desk Performance

Using Analytics and Reporting to Measure Your Support Team's Effectiveness

JULY, 2011



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Introduction

Managing your company's customer support should never feel as volatile as predicting the weather. Even if it seems that your customers' behaviors can change on a moment's notice (and oftentimes *do*) there are tools that can make your support team always feel on top of any given situation, no matter how bad it gets.

Zendesk helps support teams regain control over their help desk, improve workflows and bolster productivity as a result. Powered by [GoodData](#), Zendesk helps take support workflows to the next level by tracking and measuring your help desk activity so that the effectiveness of the operations you are putting into place are immediately visible. In fact, this is how the most sophisticated help desks manage their data.

The key is being able to see how your customer's behavior has changed over time and digging into the treasure trove of data that can be found within your support team's customer interactions. Companies tuned into their support team's performance will improve their product, bolster customer satisfaction, and identify issues quickly so corrective action can be taken immediately. So how do you share what's going on within your help desk to your entire organization? By accessing and measuring the data that drives your business.

Metrics and dashboards are all about measuring the efficiency of your help desk. The more efficient your help desk, the cheaper it is to deliver service. Reporting and analytics help you stay ahead of customers to ensure that they are happy. They help you anticipate if things are going badly before they actually *get* bad. What you see in your dashboard will tell you what's going on with your help desk long before you hear about them from your help desk agents or your customers. Especially for growing support organizations, many of which can be very chaotic, this kind of information is critical. For instance, one of the most important things a support manager should monitor is their backlog. An out-of-control backlog can lead to chaotic support, which in turn can lead to unhappy customers. Being able to measure your backlog is how support managers can always stay ahead of the curve.

The graph below shows how specific groups are handling their volume of support requests. Here is where a manager can see when a specific group or agent is falling behind on its support requests and how that is going to impact backlog. Having a view immediately available that can show when your backlog is growing gives a support manager the ability to address and correct any issues.

Ticket Flow By Group, Last Week				Click Group name to drill down to individual Agents		
Group	Created Last Week	Solved Last Week	% Solved	Backlog Impact	Backlog	
1. Level Support	644	654	102%	-10	353	
2. Level Support	125	141	113%	-16	134	
Account changes	43	54	126%	-11	18	
Business Development	1	5	500%	-4	19	
Development	29	41	141%	-12	185	
Finance	2	6	300%	-4	32	
Job applications	5	7	140%	-2	431	

Figure 1 – Dashboard showing how specific groups are performing as it relates to support requests and whether that performance is impacting backlog.

Zendesk makes it easy for companies to access the data that drives their business with:

- **On-demand dashboards, reporting and analytics.** View pre-built dashboards and reports for support ticket creation and resolution, agent performance, and top trends.

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- **Ad-hoc analysis.** Slice and dice your data using all standards and custom ticket fields to track your Zendesk performance the way you want to see it.
- **Collaborative business intelligence.** Collaborate and share custom projects, reports, and results with colleagues and management.

Why Smart Customers Use GoodData and Zendesk

Analytics and reporting on your support activity can help support managers strategize around growth and have a clearer picture of staffing needs. It gives companies the ability to dig deeper into its ticket interactions and understand what factors could cause spikes in its volume of support requests. Companies are then able to create a plan of attack to meet the needs of their short and long-term. This is how companies like Groupon, which has resolved more than 4 million tickets since using Zendesk, are able to scale their support in relation to its tremendous growth. These are the tools that empower a company to deliver the kind of support that organizations such as Groupon provide.

Measuring Key Performance Indicators (KPIs)

Using Zendesk, managers can create dashboards that enable them keep a close eye on the top five or six Key Performance Indicators (KPIs) most important to their organization.

For instance, these KPIs might include:

- Agents must answer X # of tickets
- Agents or departments must have a certain satisfaction score
- Only certain number of tickets should be escalated
-

These dashboards let managers take a step back once a week to see how their help desk is performing without having to spend the oft requisite and weekly five to ten hours of management reporting because Zendesk does it for them, out of the box.

Another metric large-volume support companies, such as Twitter and Rackspace, are interested in is **tickets by group**. They want to know which group is taking which volume of tickets and **how many tickets get passed between groups**. The reason they are particularly interested in these two metrics is because when tickets are passed between groups, it gets more expensive. This is important information to understand. No one wants to get blindsided by escalating costs in their support.

The most efficient help desks are also very interested in how their **one-touch tickets**. These are tickets that are solved with one reply. The more tickets that can be solved with one reply, the more efficient and productive your help desk. If your team doesn't seem to be solving as many one-touch tickets as it should be, this is when you can start to create a strategy that will improve the number of support requests that are resolved with one reply. For instance, with Zendesk, solving tickets with one reply is very easy thanks to macros, pre-determined responses to frequently asked questions. Macros offer organizations huge savings, because they don't require any additional people.

And companies such as Xobni, which manage outsourced support (with third party agents logging into their Zendesk), don't have to create partner reporting because that comes out of the box as well. It's not only a way to save time; it's a way to share valuable information across your organization.

With Zendesk's GoodData integration, anyone who uses Zendesk has access to the best practices of the thousands of help desks that are using it and the shared wisdom of the entire community. Regardless of your size, you get the same metrics that Rackspace, Twitter, Groupon, New Zealand Post, and Hulu, among others, use to shape their support strategy.

Where Do I Begin?

The hardest thing for most businesses is to know exactly what they should begin measuring.

Zendesk solves this issue by providing companies with the most important metrics every business should use to measure the effectiveness of their support with pre-built dashboards that represent the best practices of hundreds of Zendesk customers.

For instance, the overview tab is mission control. This is where you can see at a glance a help desk's most common metrics:

- New tickets
- Tickets solved
- Percent of tickets solved
- Average First-Time Reply
- Average Requester Wait
- First Resolution
- Full Resolution

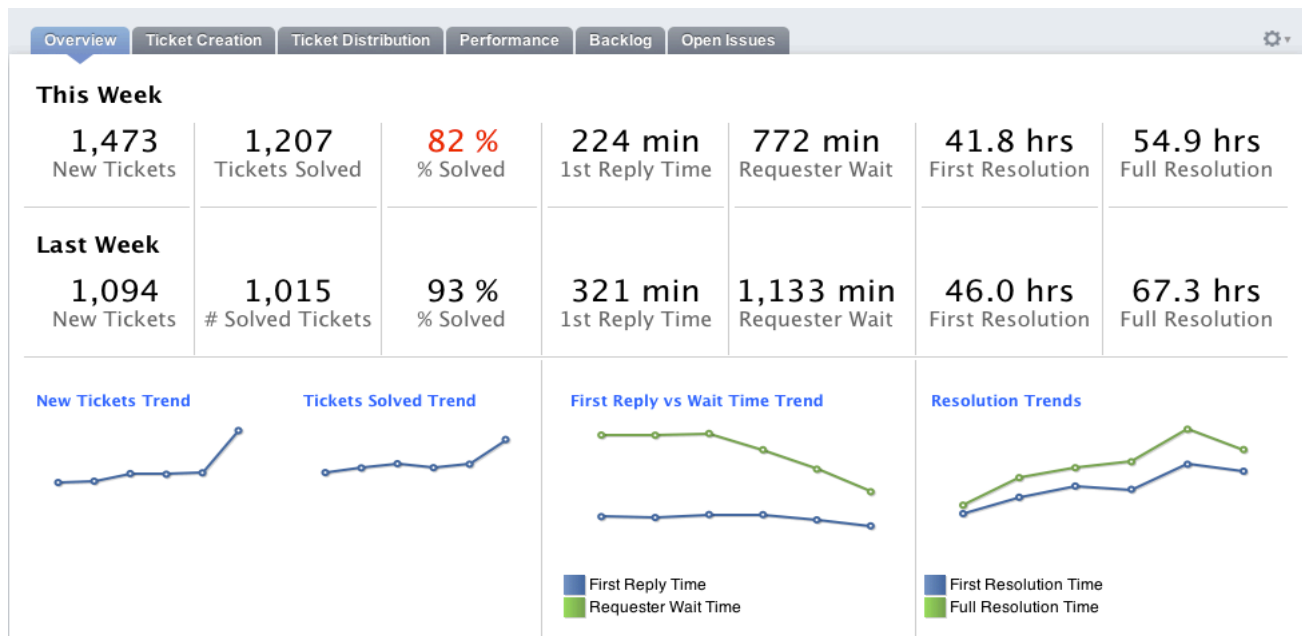


Figure 2 – Dashboard giving an overview of a help desk's most common metrics.

What these metrics help support managers do is understand their support workload their team is dealing with at any time. It also allows them to see how their support is trending over time and whether they are above or below the average. Seeing these trends empowers managers to create a support strategy that allows them to distribute their resources properly, understand their staffing needs, and their trouble spots.

Looking at that information in the larger context of how things are trending over time gives support managers the power to know when their team is delivering seamless report and when they are not, and whether their backlog is growing or shrinking.

Valuable Data Through Easy-to-Read Dashboards

For many organizations, dashboards offer a first-ever visualization of their help desk's aggregated performance. This is where managers can break down the data and point specifically to the reasons for why their response time is going up.

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This is how they can see if there may have been an incident that was never closed.

With Zendesk's GoodData integration, there are six tabs that immediately offer users a picture of what's happening. You don't have to be a statistician, you don't have to be a SQL person, or use Excel pivot tables to get this. It's all out of the box, immediately ready to go.

Let's go through a few of these tabs.

Ticket Creation

The ticket creation report shows you the volume of support requests your support team is managing. This is how you can spot spikes or valleys in your workload. And when your CEO asks you what happened, you'll have an answer.

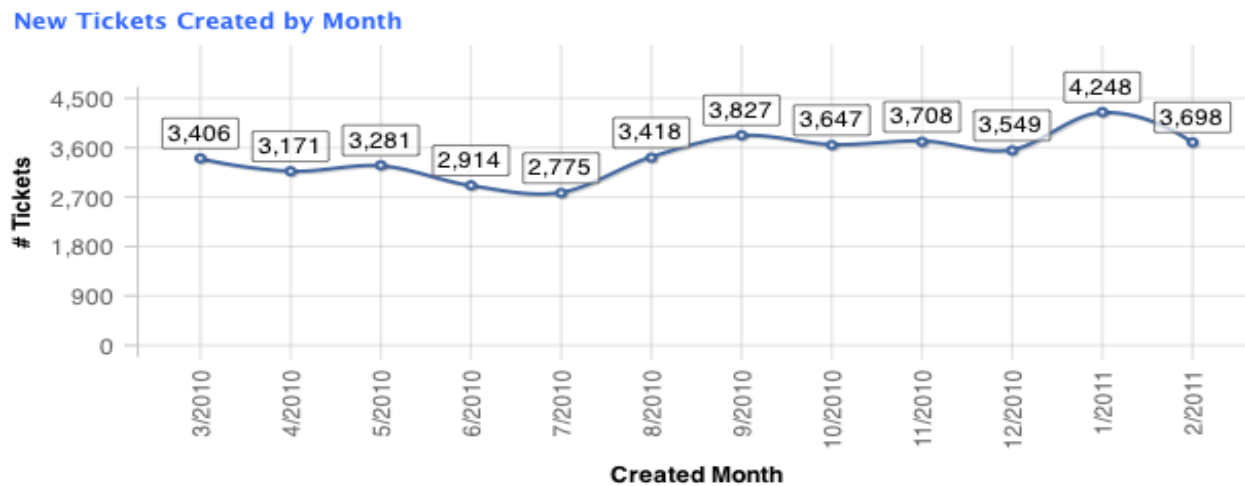


Figure 3 – This dashboard shows a monthly view of how many support requests were created.

Meanwhile, the graph below illustrates through which channels agents are fielding support. We can see that online web form and email are the most popular ways for submitting tickets.

Created Tickets by Submission Method

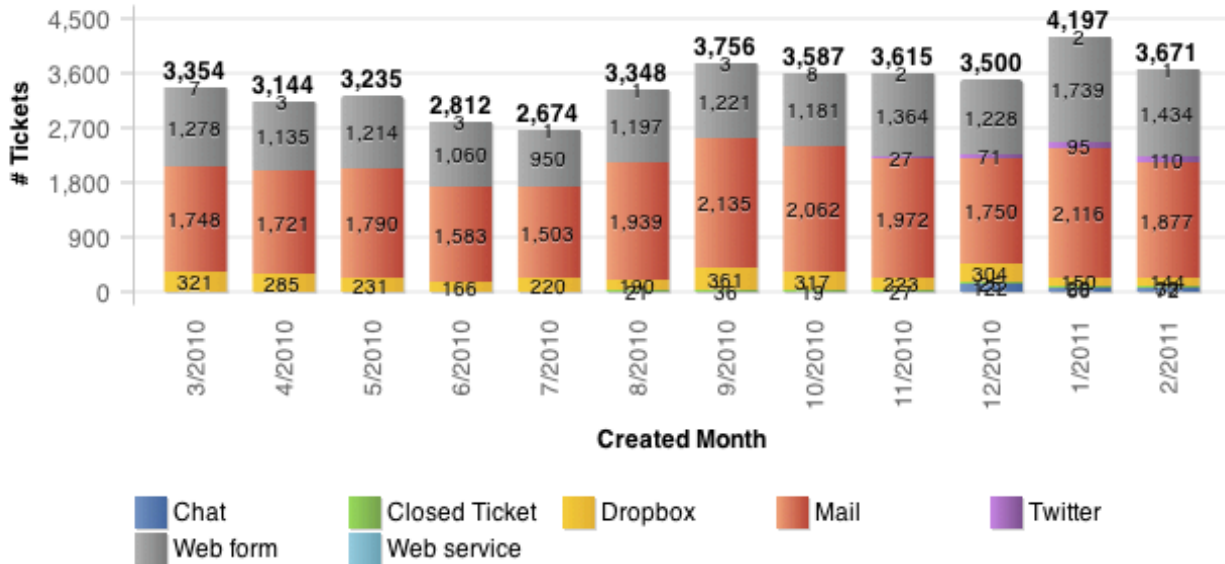


Figure 4 – Report showing through which channels support requests are sent.

This kind of view enables help desk managers to assess their company's preferred channels. From there they can ask: Do we have adequate support to handle a large volume of tickets via web form and email? Is there another channel we'd like to start encouraging our customers to use instead?

Managers can also look at new tickets by group and month. This is important because it allows you to see which groups are fielding the largest volume of tickets, and from there you can determine whether those groups have the capacity to continue to field this volume. With this information, you can then draw correlations between ticket volume and other metrics, such as customer satisfaction or ticket resolution. This is how a support manager can bolster its support team's efficiency. You can begin to find the weak spots in your support team and adjust your support strategy as necessary. This is the information support managers need to create an informed capacity planning; it will show where there are holes in your support team and where it might be over-staffed.

New Tickets by Group and Month

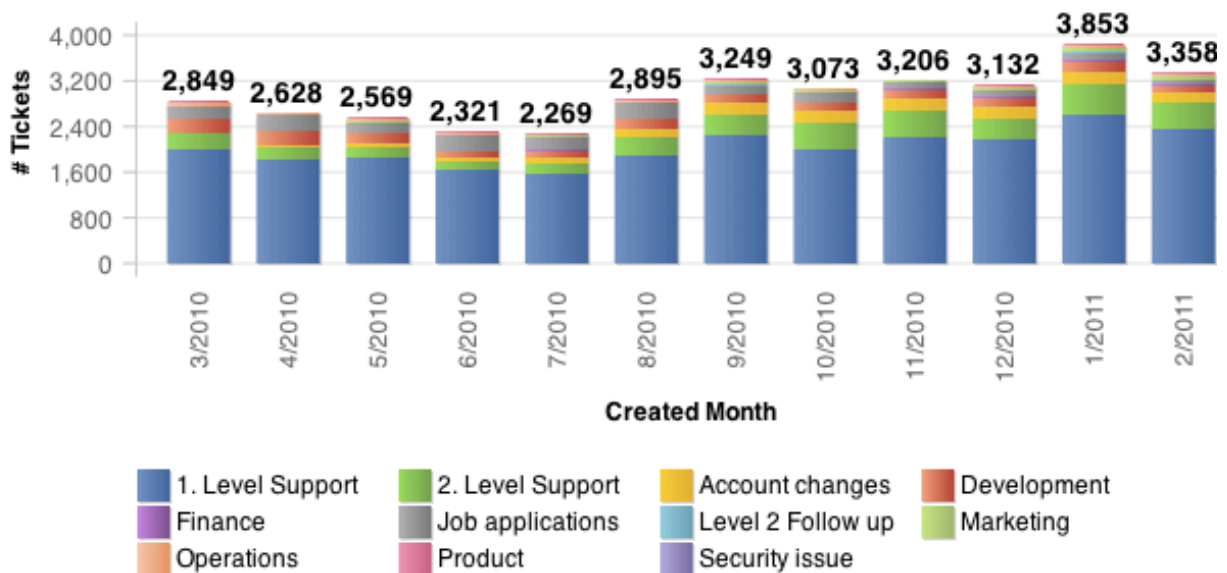


Figure 5 – Dashboard showing the monthly volume of support requests created by specific groups.

Monthly and time of day views of your company’s support activity allow you to see if there are any notable trends in volume, which can help you understand the seasonality of your support workload. For example, if your company always launches products or feature updates on Thursdays, and Thursday is already a high-volume support activity day for your company, you know to increase your staffing needs or change your launch dates.

Backlog

One of the most important things help desks care about care about is their backlog. If more requests are coming in than are solved every week, it means you’re building a backlog. The table below shows which groups within a support team are grabbing and solving support requests. What this reveals to a manager is whether their help desk is overwhelmed by support requests and whether there are enough resources to service customers in a timely manner.

Ticket Flow By Group, Last Week

Click Group name to drill down to individual Agents

Group	Created Last Week	Solved Last Week	% Solved	Backlog Impact	Backlog
1. Level Support	818	810	99%	+ 8	271
2. Level Support	144	159	110%	-15	132
Account changes	72	66	92%	+ 6	14
Development	36	40	111%	-4	169
Payment issue	24	27	113%	-3	11
Sales	29	29	100%	-	22
Salesforce replies	2	2	100%	-	13

Figure 6 – Dashboard showing a help desk with a growing backlog.

And they can use that information to plan ahead. The table below illustrates this company’s predicted backlog. Looks like the development team is falling behind. Given its weekly average for solving support requests, we can see that it’s going to take approximately four weeks to resolve all of the support requests in its queue. Armed with that information, managers can react accordingly and see what can be done to help get the development team up to speed.

Predicted Backlog

Group	# Unsolved Tickets	# Tickets Solved/Week [Avg]	Backlog
1. Level Support	271	685	0.4 weeks
2. Level Support	132	126	1.0 weeks
Development	169	38	4.4 weeks
Sales	22	45	0.5 weeks

Figure 7 – Dashboard illustrating a company’s predicted backlog by looking at the ratio of unsolved to solved tickets in a given week.

Satisfaction Scores

The definitive business metric a company can capture is whether its customers are satisfied. Zendesk makes it easy to capture customer satisfaction ratings automatically when tickets are solved. Once the evaluation has been received, comprehensive metrics are surfaced through out-of-the-box reports and dashboards. Companies can then set up workflows that immediately respond to negative ratings.

Customer satisfaction dashboards gives managers the power drill down and figure out whether your customers are satisfied with the way their issues are being resolved.

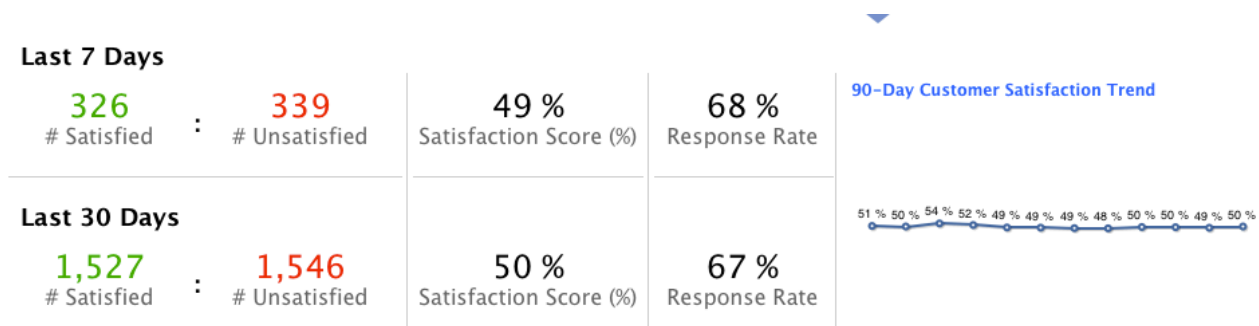
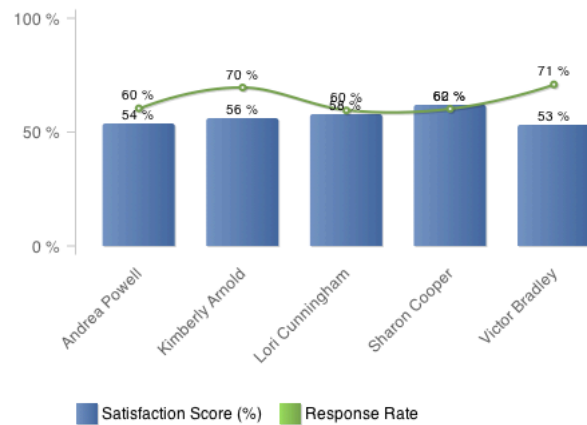


Figure 8– Dashboard showing the volume of support requests receiving positive and negative satisfaction scores.

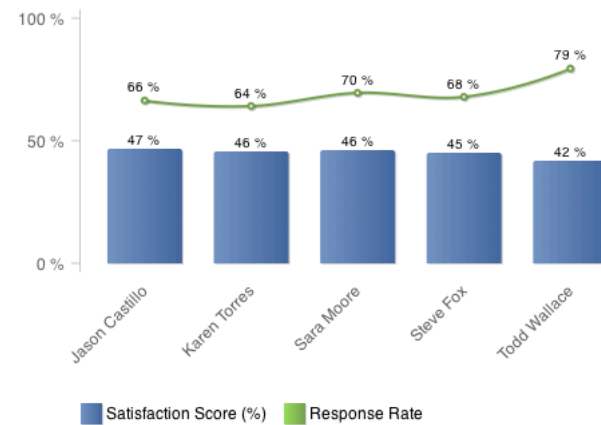
The dashboard can aggregate satisfaction levels by agent, enabling agents to spot problem areas immediately and fix them or help a company strategically train agents and assess strengths and weaknesses.

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Top Performers – Last 60 Days



Laggards – Last 60 Days



* Agents must have at least 30 ratings in the last 60 days to qualify for Top Performers or Laggards.

Figure 9 – Dashboard showing satisfaction scores broken down by agent.

This is how support managers can find out which agents might be ready to take on more challenging requests and which might need to stay put or require additional training and resources. Looking at agent performance can also alert managers as to whether there is a company-wide problem regarding your product or service. If everyone is performing low, it's a red flag that something much bigger is going on.

Ticket Distribution

Tickets refer to any and all support requests entered into Zendesk. When you reply or resolve a support request, you are replying or resolving what we call a ticket.

An important thing for support managers to look at is how those “tickets” or support requests are distributed. For instance, this is where you can determine if there is any correlation between satisfaction scores and low first-time replies to support requests. It's how a support manager can determine if they have enough agents to manage their ticket volume and keep backlogs to a minimum.

Monitoring your ticket distribution can alert you to a problem with your product or service. If you see sudden spikes in the amount of support requests you are getting, a manager can investigate right away and see if there is an underlying issue that needs to be addressed company-wide. Or what about your premium customers? Everyone wants to make sure they are happy with the level of support they are receiving. A ticket distribution report can see if you have a specific customer filing a higher than average number of tickets and investigate.

Ticket distribution reports can also show how your company is doing in regards to “one-touch” tickets. That is the number of support requests that can be answered with one reply. For most companies, macros, or pre-configured answers to resolve frequently asked questions are instrumental to delivering one-touch tickets. Beyond being able to see how features such as macros help bolster efficiency and productivity, it can also help support managers devise a larger strategy on how their help desk is using macros. This is just one more way of understanding what's happening historically within your help desk, especially as it relates to your volume of support requests and the efficiency with which you can manage those requests.

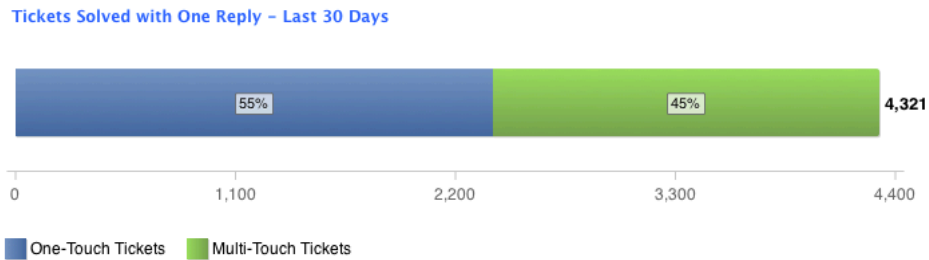


Figure 10 – This dashboard reveals that 55% of support requests were solved with one reply.

Open Issues

Support teams harness a tremendous amount of valuable information that is never shared. Instead, it goes away with the solved support request. Information that could be used to help managers detect trouble spots is lost forever. Our “open issues” dashboard solves that problem. For instance, if you have customers who continually complain they’ve been bounced around to different agents, you can see which support requests have been opened multiple times, which have been escalated through different group stations, and which were tagged urgent or high priority have continued to go unsolved.

From this dashboard, support managers can also see if an organization’s top ticket trends can help a manager immediately see where they need to allocate the most resources, and can also convey a larger message to the rest of your organization. Support is an island in a lot of organizations, which is unfortunate, since your help desk is often the greatest indicator of your company’s health and the happiness of your customers. Zendesk’s GoodData integration helps companies be customer support-oriented in an efficient way that doesn’t bankrupt or bog down any part of your company’s operations.

Meanwhile, being able to look at your organization’s volume of active tickets shows you “chatty” tickets that either represent inefficiencies in your help desk or potentially underlying problems with your product or service that are hard to resolve.

These views of your support activity and workload provide better visibility into your support team’s workflows. You now know why certain incidents occur and can devise a strategy to react accordingly. If reoccurring support issues are tied to a problem in your product or service, you now have a tangible way of sharing that information with the rest of your organization. This kind of visibility makes it easier for managers to plan for the future and prevents unwanted surprises.

Need More? No Problem. Metrics Are Easy to Customize

Many organizations can use the GoodData for Zendesk integration without ever having to change a thing. But when it is necessary to change things to fit your company’s needs, it’s easy to do. In the same way that Zendesk has made it easy to use its features, such as creating a macro, rule, or adding agents, GoodData has made it easy to change reports. For instance, if you want to measure your backlog in a different way, you can do that. If you want to exclude certain groups or certain submission methods from what you track, you can easily do that. If the cadence of your help desk is minutes as opposed to hours, you can make those changes in just a few minutes. You’re not locked into a particular way of doing things.

More Than Just Your Help Desk Data

The power of metrics is even bigger when you look at more than just your help desk data.

With Zendesk, organizations can mash up different data sets that empower them to dig even deeper into what makes their support workflows tick unite it with numbers that matter across your entire organization. For instance, you can compare your support data with data pulled from your CRM program, your website traffic, or the number of bugs tracked in your product.

You can use Salesforce or any CRM systems to show you how many of your company's tickets are from customers versus prospects or from customers whose subscription might be expiring in 30 days. If you see a long, jarring list of unresolved support requests attached to a customer trialing your product, you can go back to the support agent and try to smooth things out ASAP. Having this kind of information can help your sales team close more leads.

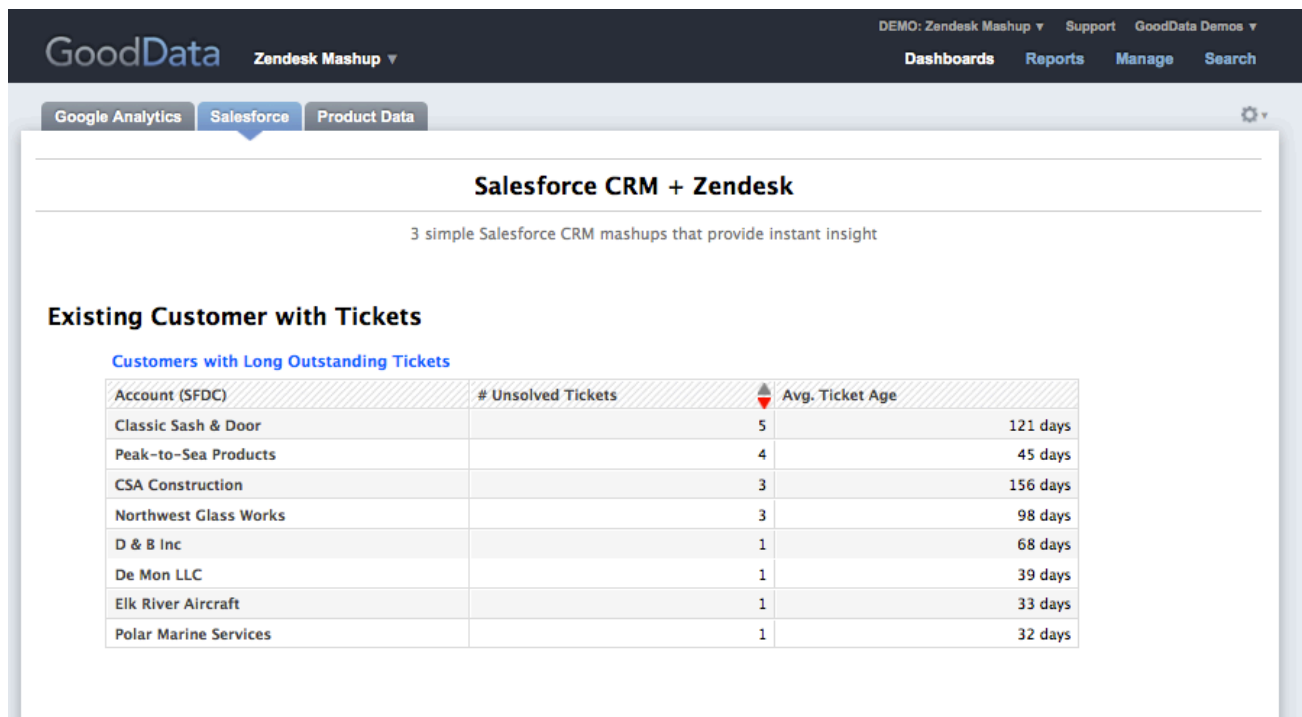


Figure 11 – This dashboard pulls data from both Salesforce and Zendesk.

One leading Zendesk customer combines its ticket data with its chat and VOIP data. This consolidated help desk reporting can give organizations insights into things such as how many tickets an agent is solving compared to how long they are on the phone. For instance, if an agent is solving 50 tickets each week, but that same agent is spending a significant time on the phone with each customer, managers can make the changes needed to increase efficiency. Or perhaps spending that time on the phone is what has helped bolster satisfaction scores. Data can be mashed up to give support managers and agents the information they need to improve support and better understand their customers' behaviors.

Another example is our integration with JIRA. We can pull data to see how many support requests are passed along to the bug-tracking system to see how far along they are to resolution. Users can also derive product usage data usage. It's possible to look at how many support tickets a customer has and determine how much they are using the product.

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These are really powerful mashups that help give a more complete picture of what's going on with your customer support. The ability to see your Zendesk data integrated with your CRM data or Google Analytics data is incredibly powerful and can better integrate your support activity into company-wide strategies and workflows.

Conclusion

Zendesk and GoodData help companies be customer support-oriented in an efficient way that doesn't bankrupt or bog down any part of your company's operations. Your sales people can sell, marketers market, your CEO manage, all the while contributing to your support team. It provides for many organizations a first-ever view into their company's entire ticket history and ticket volume.

Support teams are often the first people to know the major issues affecting your company. Reporting and analytics give managers the power to articulate and illustrate those issues quickly and easily. Having better visibility into your support activity can tell you when a significant number of customers are having an issue with a particular product or feature, or are complaining about a particular price plan. Analytics enable support teams to be proactive in their support strategy. It empowers agents and managers to very tactically gather the data of support interactions and pass them along to product and manufacturing and sales and marketing, and provide a view of the business from the customer perspective. This is how companies can improve customer satisfaction levels by creating support workflows that are seamless and efficient, all of which can lead to long-term cost savings. And most importantly, all of which can lead to happy and loyal customers.

How To Get Started

Visit us to sign up for a free 30-day trial with full access to all features at www.zendesk.com/signup.
Contact Zendesk to get started at +1 (415) 418-7506 or email sales@zendesk.com.

About Zendesk

Zendesk is the leading provider of proven, cloud-based help desk software. For growing organizations, Zendesk is the fastest way to enable great customer service. More than 10,000 Zendesk customers, including Adobe, MSNBC, Sony, OpenTable and Groupon, trust Zendesk with their most valuable asset, their customers. Founded in 2007, Zendesk is funded by Charles River Ventures, Benchmark Capital and Matrix Partners. Learn more at www.zendesk.com.

About GoodData

GoodData offers the world's most powerful Cloud BI Platform, providing our customers and partners with operational dashboards, advanced reporting and data warehousing at a fraction of the cost and complexity of other approaches. [GoodData](http://www.gooddata.com) is trusted by companies like Enterasys Networks, Capgemini, and Software AG, and embedded into offerings from cloud innovators like Zendesk, Get Satisfaction and Pardot. GoodData is headquartered in San Francisco and located in the cloud at www.gooddata.com.

