

# MANAGING BY METRICS: EFFECTIVE REPORTING FOR SUPPORT MANAGERS



## WHAT YOU'LL LEARN

We explain why support metrics are so important and what metrics to look at when compiling report information on your agents.

## EFFECTIVE MEASUREMENT IN B2B CUSTOMER SUPPORT

One of the single greatest challenges facing help desk managers today is ineffective measurement. You may know that your support team is busy, but how do you adequately report on productivity to your superiors? Consider these comments made by customer support managers at some of the nation's fastest-growing and most innovative software companies. Do any of these ring true in your organization?

- "I know my support team is extremely busy, but I don't know exactly what issues they're working on."
- "Every quarter, when it's time to prepare my report of help desk activity, I have to manually tabulate a spreadsheet, which is time consuming and not always the most accurate."
- "Our support team is stretched to the max, and I know we need to hire more support agents, but I can't come up with the qualitative data to convince our director."

Indeed, in today's competitive business world, company leaders can't just manage by instinct. They need quality data—and the right customer experience management tools—to view what is actually happening in their support operations, spot the trends, and ultimately make good business decisions.

## WHY HELP DESK METRICS ARE SO IMPORTANT

Metrics specific to the operations of your help desk are especially important because these layers of analysis can also help you be a more effective manager by:

- Monitoring productivity.
- Illuminating where your team's time is (and is not) well spent.
- Allocating resources appropriately.
- Making the case to upper management when staffing changes are needed.
- Collaborating with internal teams more effectively.
- Assessing customer satisfaction, and potential "at risk" accounts.

After all, your customer support representatives are the ones directly interacting with customers more than anyone in your organization.

That's why your customer service software must include robust business intelligence capabilities as part of its performance suite - quality data that provides real-time insights into how your team is performing.

### A good reporting system should provide analytics into:

- **Ticket open and close times.** Monitoring the number of tickets your team is opening—and the length of time to close them—gives you a window into trends that may be developing behind the scenes. Long delays in close times may be a customer agent training issue, or it may reveal a bigger issue that requires your development team to help solve.
- **Issues by customer, team/group, and individual.** With more companies embracing customer-centered support, it's important to understand your customers as a whole, rather than just one ticket at a time. A quality reporting system allows customer support agents to view all tickets and support requests coming from the same customer to identify trends and issues on a company-wide basis. Customer support agents likewise should have the ability to search tickets by Group and by Contacts, and to see which tickets are still open or closed by Company or by individual Contact, along with those that have notes or files requiring follow-up.

- **Agent responsiveness and customer satisfaction.** If you want to know how your customer service team is doing, just ask the customer directly. The best support software gives customers the option of providing immediate feedback on the quality of their interaction with the support agent and their level of satisfaction. Customer support representatives can then monitor how they're doing—and supervisors can be on the lookout for training opportunities—through each agent's ongoing Ratings report. As a result, you and your team benefit from receiving immediate feedback, tracking trends and service issues, identifying areas where more training or product development are needed, and gaining real-time metrics to improve the customer experience.

## HOW TO GET THE MOST OUT OF YOUR ANALYTICS

Make sure your reporting system is completely integrated within your customer service/help desk solution - not in an external system or add-on. In addition, a robust reporting system for your help desk should offer flexibility, allowing you to customize the type and presentation of analytics as each situation requires. For example, you'll want the ability to create detailed reports by summary, chart, or graph. And you'll also want each support agent to have his or her own customizable dashboard view to showcase the information specific to them. When it comes to painting the business case for your help desk's contributions, a picture is worth a thousand words. Let quality reporting and visually compelling metrics help tell the story for you.

For the best results, make sure your reporting & analytics are 100% integrated within your customer support system



# TEAM SUPPORT

B2B CUSTOMER SUPPORT SOFTWARE

## ABOUT TEAMSUPPORT

TeamSupport is a powerful yet easy-to-use, web-based enterprise software that helps businesses provide seamless, effective customer support by focusing on the customer and enhancing internal collaboration. TeamSupport customer service software is designed for companies with external-facing customer support.

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