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CONFERENCE & EXPO

GET READY FOR THE (R)EVOLUTION OF SUPPORT AND SERVICE MANAGEMENT

Session 302: Boondoggle to Beneficial Rethinking Customer Surveys

Andrew Gilliam (@ndytg)

Introduction

Hi, I'm Andrew Gilliam.

- ITS Service Desk Consultant
  - Western Kentucky University
- Amazing Customer Service and Technical Support™

@ndytg

linkedin.com/in/andytg

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HDI CERTIFIED
Support Center Analyst
KCS Foundation

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ICMI TOP 50 THOUGHT LEADER

Introduction

About Us

- Western Kentucky University
  - 20,000 students
  - 3,000 employees
- Information Technology Services
  - 41,000 tickets
    - 22,000 calls
    - 4,000 chats
    - 8,000 online requests
  - 12,000 unique customers

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Survey **Demo**

Download **Slides**

More **Resources**

Introduction

Key Challenges

- Survey was an afterthought
- Low response rates (< 2%)
- Responses didn’t represent reality
- Bad questions didn’t segment customers
- Operational data not linked to responses
- Problems weren’t acted on quickly

Keys to Success

1 | Know Your Audience

2 | Invitations Drive Interest

3 | Put Surveys to Work

4 | Asking Good Questions

5 | Context Is Critical

6 | Sharing What You Learn

Know Your Audience

Know Your Audience

Happy	***Angry***	***Bored***
"I owe you a favor!"	*"You ruined my life!"*	*"The link looked neat."*
Motivated	Highly Motivated	Unmotivated
Top Scores	Bottom Scores	Unsure
Wants to Write	Wants to Scream	Writing Is Too Hard
Shares Name & Details	Shares A Tragedy	Details Are Scarce
More of These	Less of These	More of These

Invitations Drive Interest

Invitations Drive Interest

3 Steps to Better Invitations

1

Clearly Request a Response

- Don’t bury the request
- Have a clear call to action

2

Use Friendly, Engaging Language

- Consider your demographics
- Use appropriate brand-voice

3

Differentiate Yourself From Scams

- Build confidence in your authenticity
- Let respondents know what to expect

Invitations Drive Interest

Subject: WKU ITS – Closed Ticket Notification for Hardware Question or Problem

Ticket Closed

WKU ITS **closed** your ticket. If you believe this to be in error or are still experiencing issues, please contact us at https://www.wku.edu/its/contact.

We invite you to fill out a short survey and provide feedback on this experience with our team. Thank you for your time.

Subject: How did we do closing ticket 123456 (Hardware Question or Problem)?

Tell Us About Your Experience

We'd like to hear from you regarding a recently closed ticket where you were listed as the requestor. Please take a few minutes to tell us about your experience with WKU ITS. You will not be asked to login to our survey, and we will not ask for personal or confidential information (like a password).

We regularly review customer feedback to help improve our services and meet campus needs.

If you need additional technical support, please visit https://www.wku.edu/its/contact.

Invitations Drive Interest

Results

Response Rate

+6.5%

More Responses

3.7x

Response Rates	Apr	May	Jun	Jul	Aug	Sep	Average
Before	2.9%	2.6%	1.7%	1.1%	1.3%	1.4%	1.8%
After	9.7%	7.3%	8.5%	8.3%	7.8%	8.7%	8.3%
	+6.8%	+4.7%	+6.8%	+7.2%	+6.5%	+7.5%	+6.5%
Response QTY	2.5x	1.9x	3.5x	5.8x	4.7x	5.9x	3.7x

Put Your Survey To Work

Why Surveys Don’t Work

- Passive monitoring.
- Long feedback cycles.
- Insights require effort.
- Difficult to automate.

Absolute Resolution (AR)

- Measures closure, completeness
  - Not Satisfaction
- Captures post-contact concerns
  - Unresolved issues
  - Incomplete information
  - Unasked questions
- Reduce perceptions of effort
  - We call you back
- Empowers anticipatory service

Absolute Resolution (AR)

①	“Would you like us to contact you to address any concerns or unresolved issues?”	
②	**Yes**	**No**
③	Gather Details, Contact Info	Continue Survey
④	End the Survey	
⑤	Email Recovery Team	

Put Your Survey To Work

AR Absolutely Works

- Less than 2% of responses trigger a follow-up.
- Customers are good at self-selecting
  - False positives: 0.16%
    - Customers who didn’t need a follow-up.
  - False negatives: 0.11%
    - Customers who continued to performance questions in error.
- Response times greatly reduced.
  - Easier on recovery team; they just check email.

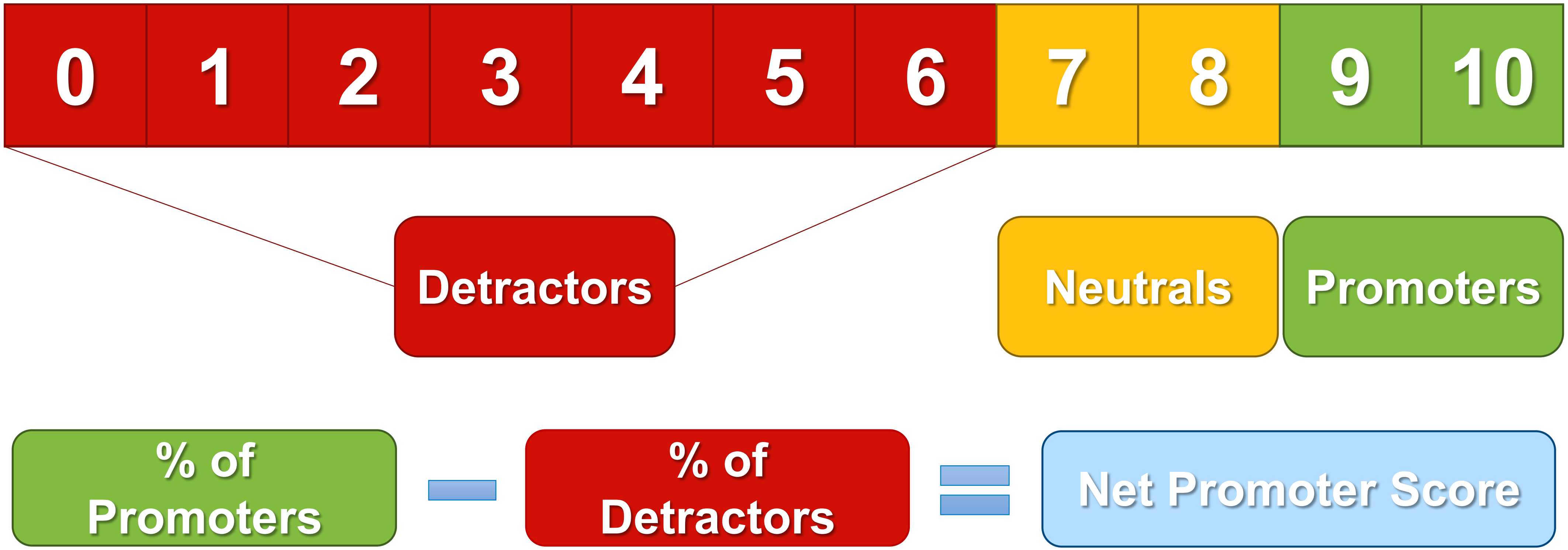
Asking Good Questions

Very Dissatisfied

- Old survey included an overall satisfaction question
- Didn’t segment customers
  - Most responses were 1’s or 5’s
  - Resulting number wasn’t helpful
- Good performance measures should segment customers
  - Differentiate between bad, okay, and great

Net Promoter System (NPS)

"How likely are you to recommend us to a friend or colleague?"



0	1	2	3	4	5	6	7	8	9	10
Detractors							Neutrals		Promoters	

% of Promoters − % of Detractors = Net Promoter Score

Asking Good Questions

Customer Effort Score (CES)

"How easy was it to work with ITS?"

Extremely difficult	Somewhat difficult	Neither easy nor difficult	Somewhat easy	Extremely easy

- Mitigate disloyalty by reducing effort
- NPS focuses on "WOW!", CES focuses on "easy"

First Contact Resolution (FCR)

"How many times did you have to initiate contact with ITS to handle your request?"

Three or more times

Twice

Once

- No commonly agreed method for measuring
- Customers may perceive contacts differently than us
  - Customer perception is reality.
  - Asking gives us insight into customer's perception.

Asking Good Questions

Competitive Comparison (CC)

"How did this experience with ITS compare to your experiences with organizations other than WKU?"

Much worse | Somewhat worse | About the same | Somewhat better | Much better

- Customer expectations are shaped by every provider, industry
- One of the more critical questions:
  - Top box NPS: 93.32%
  - Top box CES: 93.28%
  - Top box CC: 66.77%

Getting More Details

Likert Scale Fails

- How satisfied are you with the…
    - resolution to your ticket?
    - time it took to resolve your ticket?
    - IT staff's knowledge?
    - IT staff's ability to communicate effectively?
    - IT staff's courteousness and professionalism?
- Averages aren’t actionable.

Asking Good Questions

Right Question, Right Customer

- Use question branching
- Allow open-ended responses
  - Context results in better comments
  - More flexible than Likert scales

Learn More About What Matters

- Checkboxes (Yes/No) give a tally
  - Collect the same data, but useful
  - Easier to interpret and track
  - Quantify what happened
    - Four 5's and a 1 = 4.2 Average
    - Four 4's and a 5 = 4.2 Average
- Makes responding easy
  - More accurate responses
  - Don't check every box

Context is Critical

Context Is Critical

Experience Data

- From our survey
  - Customers tell us how they feel

Operational Data

- From business processes
  - What we did to customers

Context Is Critical

Moving Mountains

- Aggregate scores are like mountains.
  - Impossible to move.
- **Operational data** is the story of how the mountain was created.
  - Story behind the score.

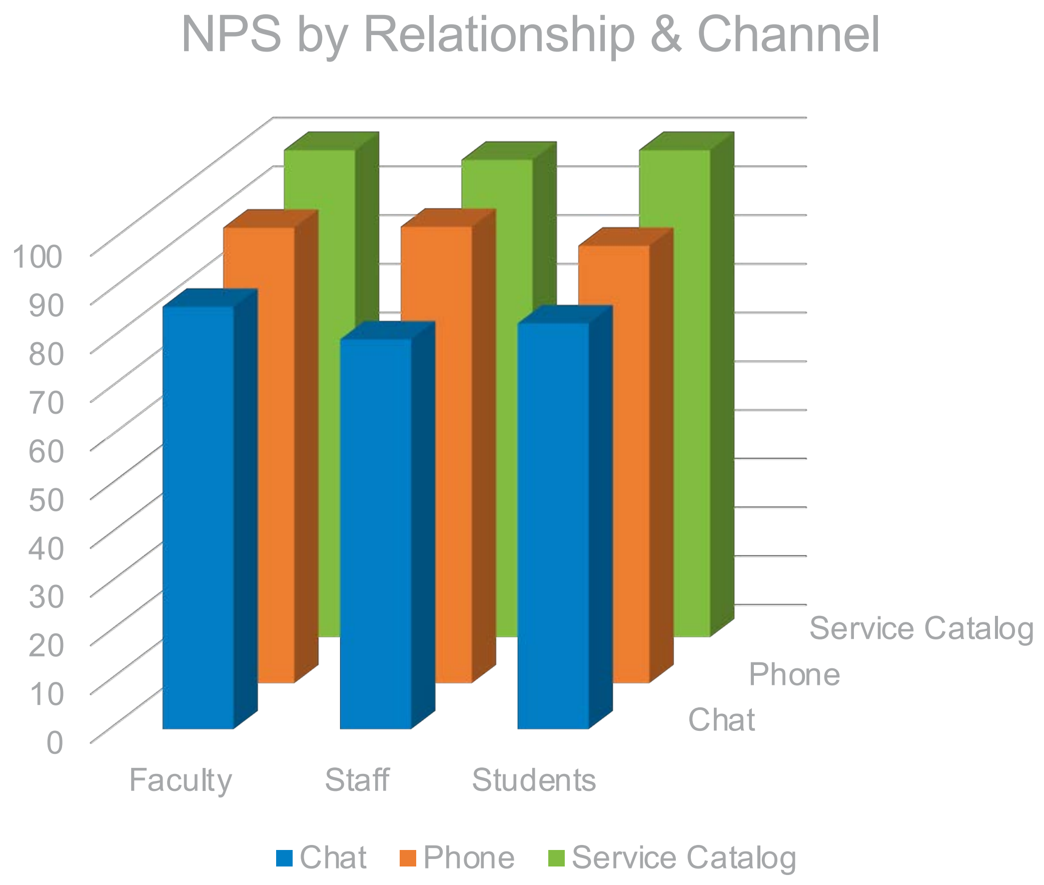
Context Is Critical

Operational Data

- Resolved By
- Resolved By (Group)
- Ticket Type
- Contact Source (Channel)
  - Phone, Chat, Service Catalog
- Customer Relationship
  - Faculty, Staff, Student, Alumni, etc.

Learning from Linked Data

- Understand differences between internal and external customers
- Understand which processes create the worse sentiment

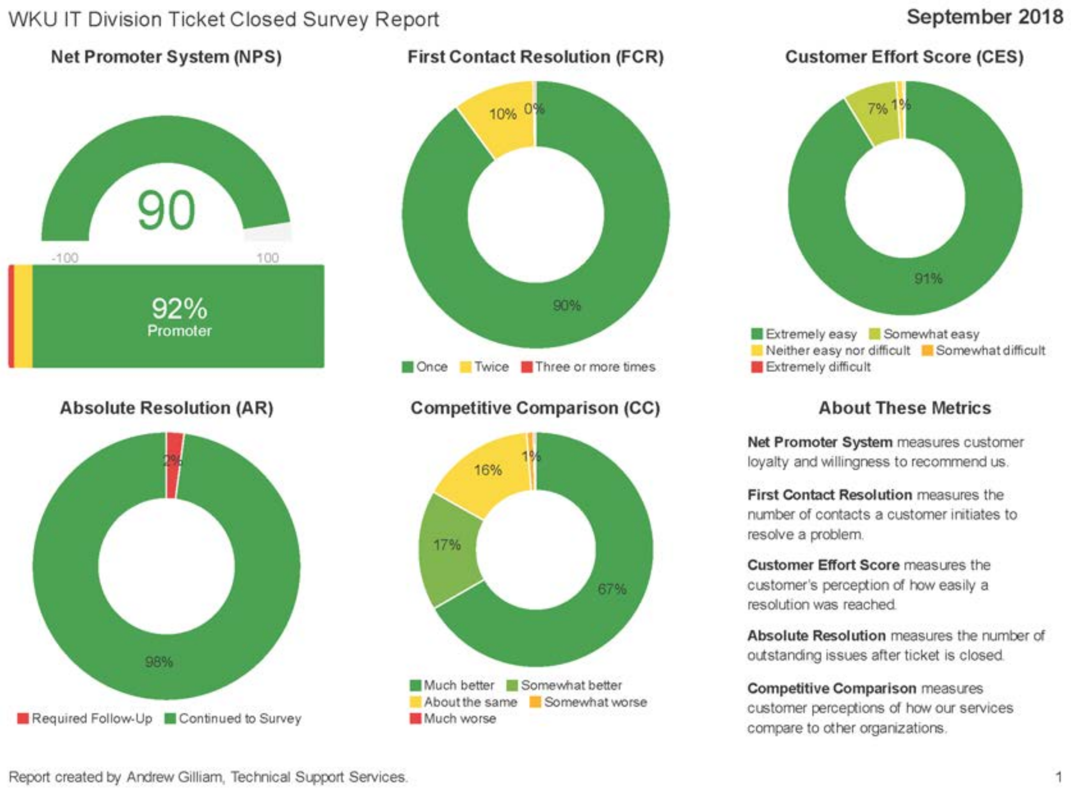


Sharing What You Learn

Front-Line Buy-In

- Sincerely requesting feedback drives responses
- Comments motivate and boost morale
- Reward for responses; coach by results.
  - Encourage learning, scores will follow.

Executive Dashboard



WKU IT Division Ticket Closed Survey Report

September 2018

About These Metrics

Net Promoter System measures customer loyalty and willingness to recommend us.

First Contact Resolution measures the number of contacts a customer initiates to resolve a problem.

Customer Effort Score measures the customer's perception of how easily a resolution was reached.

Absolute Resolution measures the number of outstanding issues after ticket is closed.

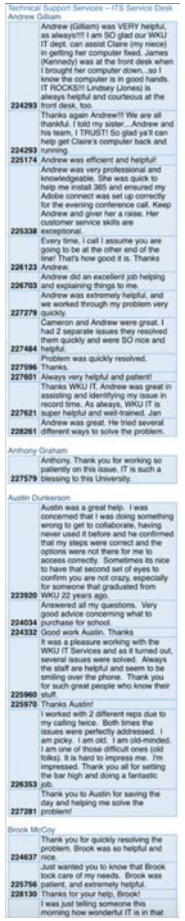
Competitive Comparison measures customer perceptions of how our services compare to other organizations.

Report created by Andrew Gilliam, Technical Support Services.

1

Kudos Report

- Monthly report of all positive feedback.
- Encourages survey promotion
  - September: 107 comments
  - August: 142 comments
- Pride in delivering world-class service
  - Even if behind-the-scenes



Technical Support Services – ITS Service Desk

Andrew Gilliam

224293	Andrew (Gilliam) was VERY helpful, as always!!!! I am SO glad our WKU IT dept. can assist Claire (my niece) in getting her computer fixed. James (Kennedy) was at the front desk when I brought her computer down...so I know the computer is in good hands. IT ROCKS!!! Lindsey (Jones) is always helpful and courteous at the front desk, too.
224293	Thanks again Andrew!!! We are all thankful. I told my sister....Andrew and his team, I TRUST! So glad ya'll can help get Claire's computer back and running.
225174	Andrew was efficient and helpful!
225338	Andrew was very professional and knowledgeable. She was quick to help me install 365 and ensured my Adobe connect was set up correctly for the evening conference call. Keep Andrew and giver her a raise. Her customer service skills are exceptional.
226123	Every time, I call I assume you are going to be at the other end of the line! That's how good it is. Thanks Andrew.
226703	Andrew did an excellent job helping and explaining things to me.
227279	Andrew was extremely helpful, and we worked through my problem very quickly.
227484	Cameron and Andrew were great. I had 2 separate issues they resolved them quickly and were SO nice and helpful.
227596	Problem was quickly resolved. Thanks.
227601	Always very helpful and patient!
227621	Thanks WKU IT, Andrew was great in assisting and identifying my issue in record time. As always, WKU IT is super helpful and well-trained. Jan
228261	Andrew was great. He tried several different ways to solve the problem.

Anthony Graham

227579	Anthony, Thank you for working so patiently on this issue. IT is such a blessing to this University.

Austin Dunkerson

223920	Austin was a great help. I was concerned that I was doing something wrong to get to collaborate, having never used it before and he confirmed that my steps were correct and the options were not there for me to access correctly. Sometimes its nice to have that second set of eyes to confirm you are not crazy, especially for someone that graduated from WKU 22 years ago.
224034	Answered all my questions. Very good advice concerning what to purchase for school.
224332	Good work Austin. Thanks
225960	It was a pleasure working with the WKU IT Services and as it turned out, several issues were solved. Always the staff are helpful and seem to be smiling over the phone. Thank you for such great people who know their stuff.
225970	Thanks Austin!
226353	I worked with 2 different reps due to my calling twice. Both times the issues were perfectly addressed. I am picky. I am old. I am old-minded. I am one of those difficult ones (old folks). It is hard to impress me. I'm impressed. Thank you all for setting the bar high and doing a fantastic job.
227281	Thank you to Austin for saving the day and helping me solve the problem!

Brook McCoy

224637	Thank you for quickly resolving the problem. Brook was so helpful and nice.
225756	Just wanted you to know that Brook took care of my needs. Brook was patient, and extremely helpful.
228130	Thanks for your help, Brook!
	I was just telling someone this morning how wonderful IT is in that

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