

Raising the Bar . . . Continuous Improvement at Telcordia's Help Desk Center

by Carol M. Panza

Background

Telcordia (formerly Bellcore) was purchased by SAIC in 1997. At that time, the computer help desk within Telcordia was performing to world class standards. The same function within SAIC, however, was performing poorly and for much higher operating costs than that for Telcordia. The Chief Information Officer (CIO) for both companies saw an opportunity to use Telcordia as a model to improve results for SAIC's help desk. But, first things first. We needed to begin by looking at the master performer function, Telcordia's help desk, including the goals, objectives and fit of this function into Telcordia, as well as, how the help desk got to be a master performer organization.

In 1995 Telcordia's help desk was anything but a master performer. Yet the help desk function was (and still is, of course) critical to its client population, Telcordia employees. The computer help desk is part of the Information Technology (IT) function. The IT organization provides a number of important services such as:

- specification and sourcing for computer hardware
- maintenance and coordination for hardware repair
- support for the introduction and use of computer software
- maintenance of the company's internal computer network

Within IT, the computer help desk is the first point of contact by customers for many services provided by IT and either resolves customer issues and/or questions, or establishes a case for resolution by one of several specialized technical areas. The overall objective for the help desk is to answer (resolve) a majority of issues at the help desk level and to correctly specify resolution requirements for any issues referred beyond the Rep who receives the initial call. The help desk must, therefore, be responsive to both customers using IT services and other internal specialized technical professionals within IT who handle complex and system wide issues as well as issues requiring on-site intervention. Furthermore, the help desk (call center) must handle incoming calls such that abandoned calls, wait times and call duration/resolution time are minimized while quality (customer satisfaction and first call resolution) is optimized. . . . Again, in 1995 the help desk was not an asset to the IT function. Since the help desk was the first, and also, most frequent experience that most customers had with the IT function, interactions with the help desk, set the tone and formed the image customers had of the whole function. Bottom line, the help desk had to be turned around and turned around quickly.

A re-engineering effort was undertaken by the CIO, Robert Evans, and within six (6) months the help desk began to show improved results. Within twelve (12) months the help desk was not only achieving acceptable standards, it was regularly exceeding its customers' expectations. How was this accomplished? Following are the basic steps:

- Determine and confirm customer wants and needs. (All of IT including the help desk)
- Focus the help desk (and the rest of IT) into skill sets matching customer requirements.
- Document and measure (evaluate) customer services provided and all customer contacts.
- Establish goals for servicing the customer (spanning the whole IT function).
- Measure customer satisfaction and initiate follow-up by IT managers with customers, using identified support problems to improve the system and management’s ability to drive the improvement process.

Mastery Model versus Continuous Improvement

When SAIC purchased Telcordia in 1997, Robert Evans was tapped to take over as CIO of SAIC in addition to Telcordia. It didn’t take long to identify the performance improvement opportunity existing for SAIC’s help desk (See figure 1). By 1997, Telcordia’s help desk had not only made a dramatic turnaround, it had also maintained these, now world class, performance levels for eighteen (18) months. SAIC had the potential to realize significant performance gains by implementing the existing mastery model developed by Telcordia. Note that performance improvement within the help desk could be counted in revenue gains and cost reductions (for productivity improvements) by “line” performers who were customers of the help desk, as well as the anticipated cost reduction for IT services.

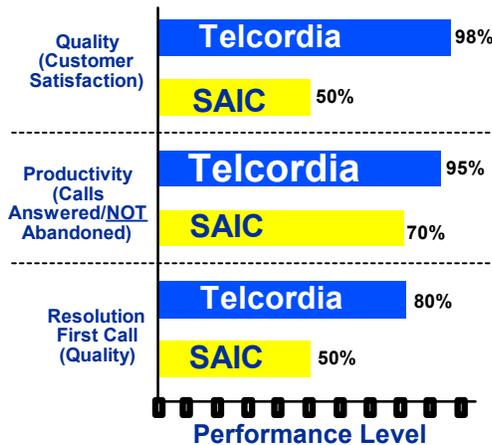


Figure 1. A comparison of Telecordia and SAIC Help Desk Results.

The above depicted performance gap, led to a request for a performance improvement project focused on implementing the Telcordia help desk “model” within SAIC. Though raising SAIC’s help desk results to approach the levels achieved by Telcordia would have been a valuable accomplishment, such an approach would have assumed that Telcordia’s help desk couldn’t get any better. That is, it would have negated the fundamental concept of continuous improvement. We believe that master performers, even the leaders in their industry and/or field of endeavor, can’t ever afford to assume that they are as good as they can get. This is not to say that the master performer process should be ignored, however. It does mean that relying exclusively on the current model of mastery, keeps an organization from achieving optimal performance levels. Organizations need to identify improvement opportunities within master performer functions and processes just as they would with any other performance improvement target. Organizations

should seek to continuously improve all processes and performers, including master performers, based on up-to-date customer wants and needs, rather than to focus only on obviously poor or underachieving performers. Organizations need to keep their eyes on the marketplace (their operating context) first, last and always.

A Performance Analysis/Improvement Specification Approach

We must reiterate that continuous improvement is the name of the game. And, that external customers of the larger organization, in this case Telcordia and SAIC, are the only legitimate starting place for developing performance requirements for any and all functional parts of any company or organization. There are three important concepts that characterize our analysis approach and, we believe, account for its effectiveness. They are summarized following:

Macro to Micro - Start with the macro/context and relationship view of the organization versus process specification. Begin at the macro level to view the organization and its key functional parts in the context of the marketplace in which it operates, i.e., the organization’s customers, suppliers, competitors and regulatory authorities. Defining performance context is the essential first step, whether or not the organization has a profit goal. And, this must precede analysis and improvement actions focused on processes, even key cross-functional processes.

Accomplishments - Specify process as a sequence of accomplishments versus behaviors or just “stuff” (and don’t stop with master performers in defining should be/could be). Process specification needs to be an articulation of the series of accomplishments (This concept was introduced by Tom Gilbert in his book, *Human Competence*, McGraw Hill, 1978.) or outputs required to produce a valued product or service or to treat a key input. This is in contrast to what we usually see which typically lays out a sequence of actions or behaviors, what people do rather than what they must get done or accomplish.

Expectations, Resources, Consequences, Feedback - Use the “human performance system” to ensure that all performance requirements and any changes are linked back to organizationally desirable goals and performers are properly supported. People must be specifically addressed since they are the organization. The Human Performance System (See figure 2 below.) model is a useful tool for designing expectations, resources, feedback and consequences for all performers that directly and properly support established process requirements which then link back to macro level context or “marketplace” results.

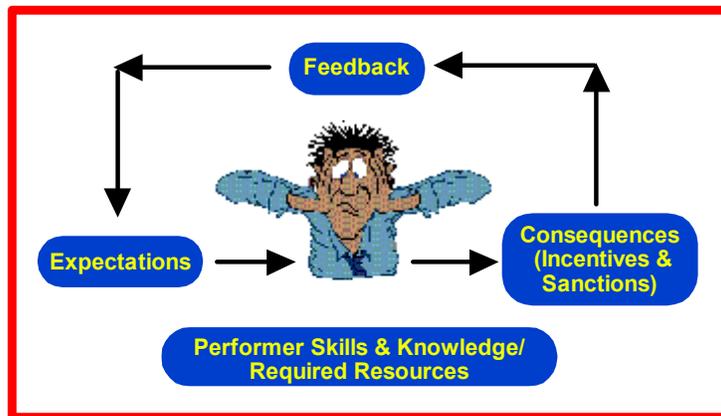


Figure 2. Components of the Human Performance Environment.

Improving the Master Performer (as well as targeted performers)

You can, of course, realize performance improvement benefits if you address only targeted (underachieving) performers using models derived from master performers. We don't believe that this is the optimum strategy, however. Following are some thoughts in that regard:

Basic Opportunity - Implement improvements to move underachieving or target performers to the level of master performers.

Optimum Opportunity - Address master performers (or the master performer process or organization) first. Then, you have the opportunity to multiply the value of improvements in target areas and reinforce the concept and practice of continuous improvement with master performers.

Opportunity Cost - The value of the gap between the "is" and "could be" of performance by currently designated master performers (continuous improvement by any other name), is actually an opportunity cost. Of course, if that mastery model is used to guide performance gains of other performers, opportunity cost is even greater.

Our first step was **not** documentation of the current process operated by the Telcordia help desk. Instead, we began our analysis at the macro organization relationship level by viewing (via a relationship map) the computer help desk in the context of the IT organization and, ultimately Telcordia and SAIC. Since the help desk provides a range of services, we created a map for each distinct service offering. (See Figure 3.)

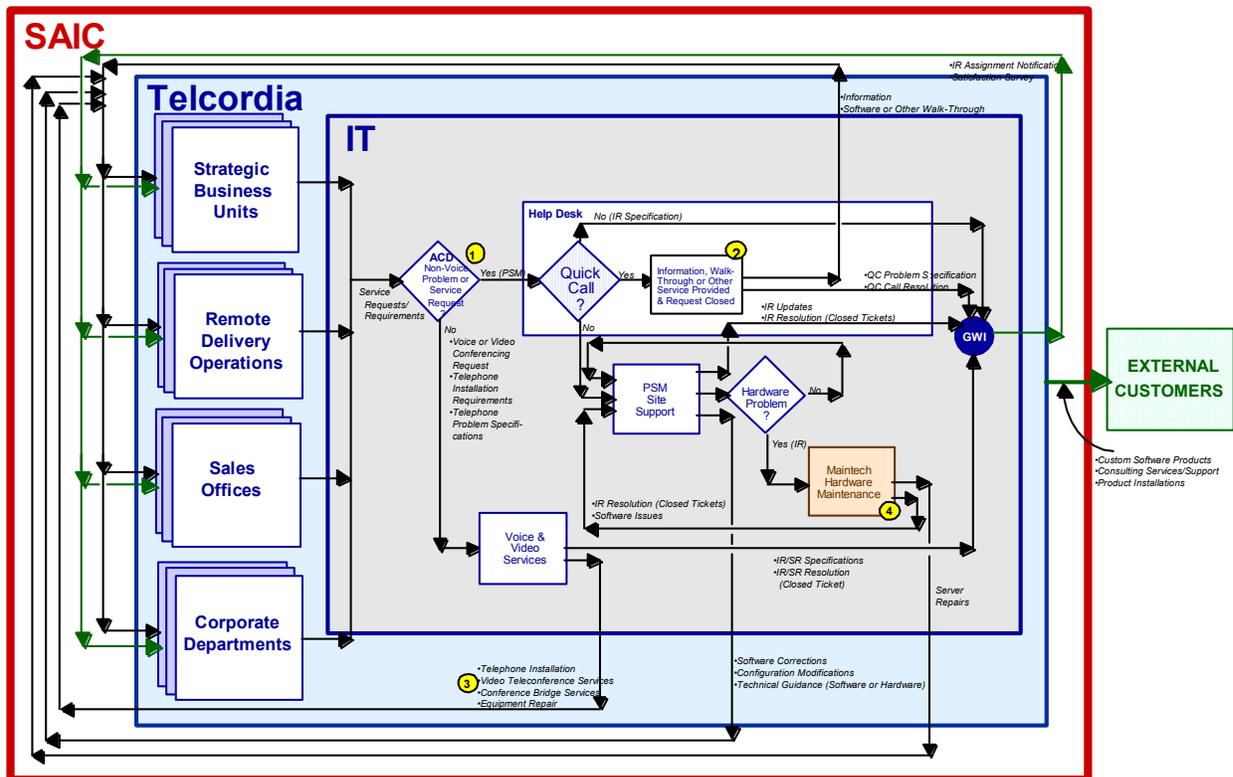


Figure 3. Example of Telcordia Help Desk architecture.

Notice that the help desk has two levels/types of customers, 1) those that are internal to the IT function and 2) all other Telcordia functions and employees, i.e., strategic business units, remote delivery operations, sales offices, and corporate departments. It is at this macro, context stage of our analysis that we begin to document issues (performance improvement opportunities, identified on the map in the yellow circles) that are summarized and presented to the client throughout the course of the project. A portion of the issues summary is shown in Figure 4.

Topic	Question/Issue Detail	Preliminary Suggestions
Customer Satisfaction	Quick Calls represent a large percentage of the call volume into the Help Desk. Currently, however, customer satisfaction surveys are not being generated for any of these calls.	Consider implementing the system modification(s) and/or procedural changes for agents to generate customer satisfaction surveys for all or at least a sample of Quick Call customers.
Help Desk Performance	Counting each call into the Help Desk as "1" masks the fact that all calls are NOT created equal. Some types of calls are easier and others harder to answer.	Consider an evaluation of calls by type, to assign a relative weighting based on difficulty and/or resolution talk time requirements so that call volume can be reported as both the raw number of calls and the weighted volume.

Figure 4. A summary of performance improvement opportunities.

Performance Improvement Opportunity Summary

We like to refer to any issues (or what some may call problems) that we uncover and document, as performance improvement opportunities. We use this language intentionally because our findings are not indictments of anyone. After all, it is the rare performer at any level in the organization who gets up in the morning and says, “Hey, I think I’ll go to work and do a really bad job today!” All performers (even executives), operate in the context of a performance environment as portrayed in Figure 2. We also make it a point to talk about improvement opportunities with the performers and/or function-level representatives concerned with each opportunity, prior to “reporting them” to management and as part of confirming and/or enhancing the maps built as deliverables for any project. In this way, performers within the organization begin to take ownership of the analysis and related findings early on. They begin to have their own stake in the improvement actions that are likely to be required. Note that opportunities are surfaced and defined throughout any project. We choose to share opportunities as they are identified, rather than to wait until the end and do the Vanna White “thing.” This gives clients the option of beginning to implement some actions even before the end of a project. It can also help to build support for more extensive and long term implementation requirements.

Once the macro, relationship and context level analysis is complete, we move to the process level. For the Telcordia computer help desk, a cross-functional process flow was created. This process map was actually a combination of “what is,” as learned through studying the master performer process, and “what could or should be,” as determined from what we knew about what was required (ideally) by the two levels of customers identified at the macro level. The first draft of the process flow was reality checked (including issues/opportunities identified at this level) and refined/enhanced with help desk performers, i.e., reps., supervisors and managers. The reality check step was another opportunity to gain buy-in and, in fact, ownership on the part of help desk professionals. Then, together with help desk management, we presented the

revised cross-functional flow to internal IT customers and, ultimately, to other Telcordia customers who were external to IT. There is a portion of this cross-functional process flow included as Figure 5.

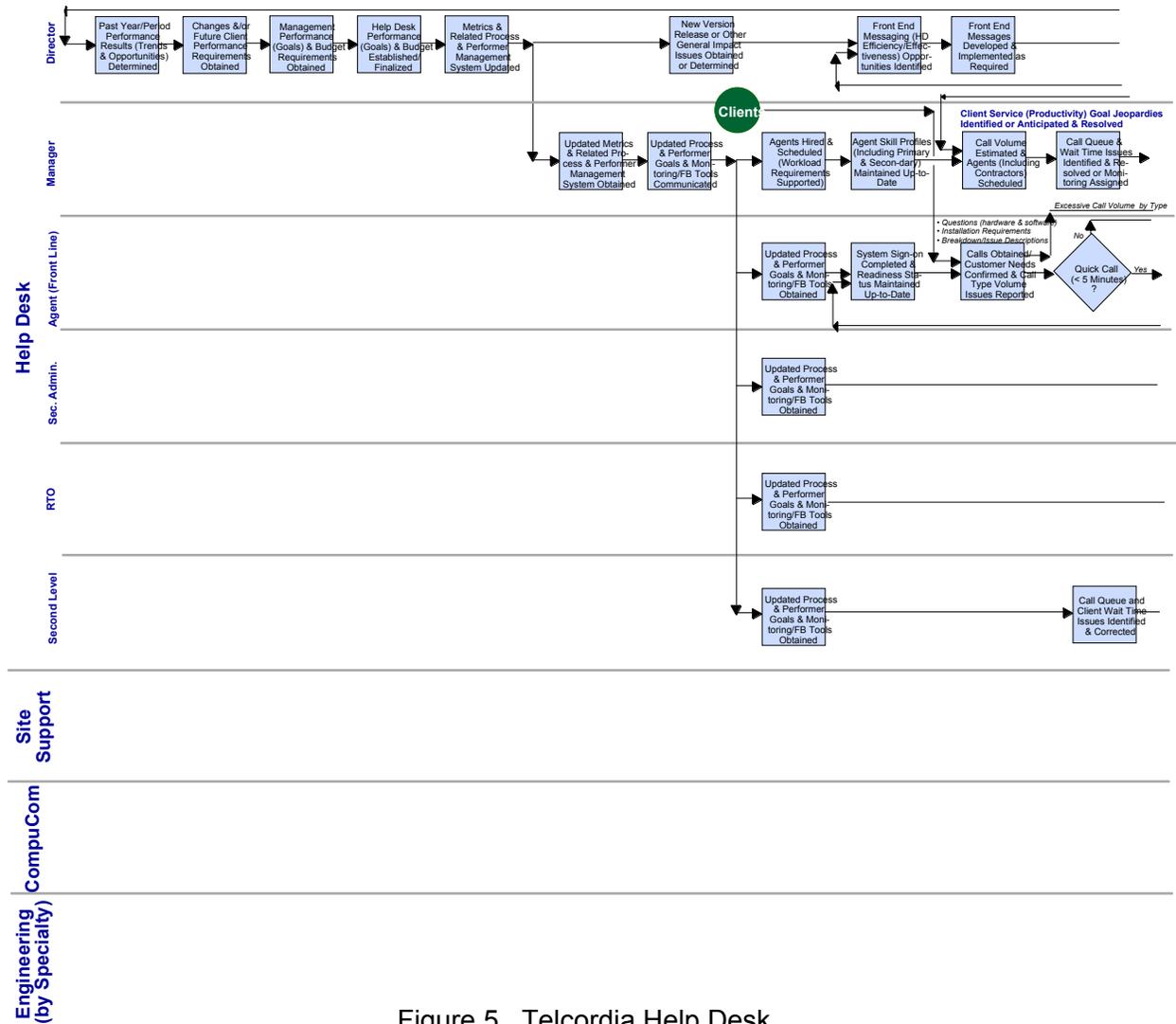


Figure 5. Telcordia Help Desk.

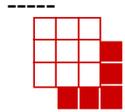
Help desk management proactively developed and presented action plans to respond to opportunities identified in the context of the project and built on some initial suggestions we made. Help desk management also successfully used the process of reviewing the cross-functional flow with their customers, to build or enhance relationships with their customers. These managers continue to keep these flows posted as an important management tool for the help desk and continuing improvement action planning. In fact, Telcordia went on to seek and attain certification from a third party certification organization with the highest rating ever achieved to that date. Following are some typical uses for cross-functional flows:

Document/confirm your understanding of “what is” and identify improvements. (Get the client to take ownership of improvement opportunities.)

Identify and document/confirm performance improvement opportunities. (Provide your client, the target organization, with a way to interact objectively and “constructively” with their customers, facilitating a desirable and constructive partnership for improvement between your client and their customers)

Leave behind that provides clients with a new way to look at themselves and their performance context.

For the Telcordia/SAIC project, we did not go further and complete specific analysis at the performer/position level. So, at the end of the process analysis phase, we were able to take the completed model and use it as a tool in looking at opportunities within SAIC’s computer help desk. However, the model that we developed was implemented (with the participation and enthusiastic support, once we got started!) by the Telcordia or master performer computer help desk organization. So, in the end result, the master performers improved their continuous improvement process, in addition to building the model and framework that was the initial project objective. Moral of the story . . . all performers, even master performers, can always (and should always strive to) improve continuously and based on a comprehensive look at current and potential customer needs.



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