Service Desk Operational Excellence

BridgeView Partners

February 2020

BRIDGEVIEW
PARTNERS

PROJECT: Service Desk Operational Excellence

COMPANY SIZE: 10,000

COMPANY INDUSTRY: Healthcare

CUSTOMER SINCE (OR YEAR OF PROJECT): 2014

CLIENT
Largest Philadelphia-area health insurer with 2 million regional/7 million nationwide customers. 160 hospitals/42,000 healthcare professionals in-network with 7,000 employees supported by Information Technology (IT) – "Level 1" IT Service Desk for 24/7 telephonic support, triage and problem resolution/"Level 2" escalation

PROBLEMS
- Level 1 Desk performance, even in handling of simplest incidents (password resets, access requests, etc.)
- Desk service-level agreement (SLA) metrics misaligned with relevant performance-tracking
- Lack of self-service and automation in user support processes

"Virtually all our key Desk metrics were out of whack. Sure, there were some contributing factors beyond our control, but we weren't representing IT well nor serving users up to acceptable standards. We needed expertise and help to rectify the situation."

– **Maryann Phillip**, IT Service Desk Director

SOLUTION
- BridgeView Partners ("BridgeView") Level 1 Support engagement to:
    - Improve Level 1 Desk performance
    - Instill proper SLA metrics for true Desk performance-tracking
    - Empower users and introduce workflow automation into user support processes

"Many users see the Level 1 Service Desk as the 'face of IT,' so it's very important to staff it with the correct number of trained professionals."

– **Nick Robak**, Managing Partner
BridgeView Partners

SITUATION
Prevalent Business Conditions
- Call volume spikes during benefits open-enrollment periods
- Consolidation of 2 claims processing systems into 1
- Period of heavy management and Desk staff turnover
- Replacement of the client's legacy service management software (HP Service Manager) with ServiceNow (ITIL-based cloud application)
- 3 different recruiting vendors attempting to satisfy Desk staffing needs

Level 1 Desk Symptoms
- Desk frequently operated 25% under minimum capacity
- Significant shorting of service-level agreement (SLA) commitments:
  - 40% of user calls were password-reset requests – despite an available online self-service portal
  - Too many calls were being escalated to Level 2
- Average on-hold times were too long
- Users abandoned calls while on hold far too often

How BridgeView Became Engaged
- BridgeView consultants were engaged with the client at the time helping IT complete an unrelated project
- Firm was also 1 of the 3 vendors staffing the Level 1 Desk team
- Bridgeview specializes in improving Level 1 Support performance and the client hired them to do so

WHAT BRIDGEVIEW DID

Discovery
- Analyzed Level 1 Desk's existing SLAs
- Created "30-60-90" (day) plan to improve people, process, and technology
- Used project experience and best-in-class research sources to:
  - Narrow existing SLAs down to only those with direct correlation to actual Desk performance
  - Benchmark suitable target metrics for new SLAs with healthcare industry best practices
- Presented recommendations to the client:
  - Availability rate needed to be 70% (Desk's current rate: 48%)
  - Average speed-of-answer for >=80% of all inbound calls needed to be <=60 seconds (Desk's recent average had been 3 minutes but it had ballooned to 8 minutes in the immediate past)
  - Abandon rate needed to be <=8% (Desk's current rate: 15%)
  - First-call closure rate needed to be >=70% (Desk's current rate: 55%)

Execution of "30-60-90" plan
- Minimized inbound password-reset and similar calls:
  - Formed subgroup of lesser-experienced Desk agents and auto-routed low-complexity calls here
  - Fixed self-service portal and "re-marketed" it to users via email
- Delegated all overnight and weekend call coverage to a niche third-party call center:
  - Trusted BridgeView partner
  - Fee-per-call-taken pricing model would be tremendous cost savings for the client (vice usual per-hour-per-agent model)
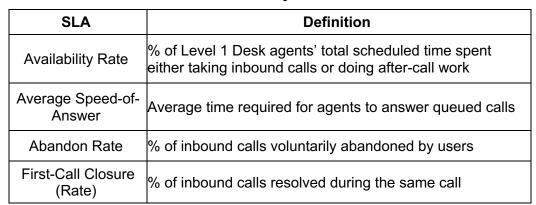
EXECUTION (CONTINUED)

- Established outbound follow-up process to significantly improve Desk's Availability Rate and user satisfaction:
  - Desk agents contact users post-call

- Tasks: confirm problem resolution, request feedback
- Improved Desk's staff quality and depth:
    - Assessed current staffing, required staffing to achieve SLA targets and determined "gaps"
    - Documented prototypical Agent qualifications
    - Presented findings – 18 to 20 Agents, spread out in 2 shifts, should comprise Level 1 Desk
    - Created reliable process to screen and train contractors to meet the client's high personnel standards
    - RESULT – the client was so satisfied that they selected BridgeView to be the Desk's exclusive contract staffer
- Implemented ServiceNow as new service-management workflow solution:
    - Served Program Management, Solution Architect and other roles
    - Defined requirements for ALL self-service questions to ask for intuitive ticket-assignment
    - Maximized ticket assignment and routing automation
    - Refined definitive data sources for more valuable reporting

SLA "Glossary" 💡

SLA	Definition
Availability Rate	% of Level 1 Desk agents' total scheduled time spent either taking inbound calls or doing after-call work
Average Speed-of-Answer	Average time required for agents to answer queued calls
Abandon Rate	% of inbound calls voluntarily abandoned by users
First-Call Closure (Rate)	% of inbound calls resolved during the same call

"We helped our client convert 200 distinct service catalog items from HP Service Manager, with completely re-engineered request and incident processes not only for the Level 1 Desk but also for business operations teams such as Claims Processing and Billing."

– **Moira Stepchuk,** Principal Consultant
BridgeView Partners

CLIENT RESULTS AND BENEFITS

Since the successful completion of the Level 1 Support engagement, the Desk's all-around performance has been stabilized. The client has hired two BridgeView-provided Level 1 Desk contractors as full-time employees. Externalizing weekend and overnight coverage hours has allowed the core Desk agents to sharpen their focus on peak inbound calling periods during normal working hours, and the per-incident fee structure has generated the anticipated cost savings.

Specific Performance Improvements
- Availability Rate now **64%**
- 80% of all calls are close to a **60-second** Average Speed-of-Answer

- Abandon Rate down to **8%**
- First-Call Closure now up to **80%**
- Password reset requests now account for **only 25%** of all calls (**$95,000** in annual cost savings)

"We're committed to BridgeView Partners as our go-to expertise for Level 1 Support. Our organizations have matured into a partnership – we frequently collaborate now on ways to continuously improve what we've established."

– **Maryann Phillip,** IT Service Desk Director