Putting SERVICE back in ITSM:

Strategies to Improve Your Customer and Your Business Outcomes

ITIL 4 Definition of a Service

"A means of enabling value co-creation
by facilitating outcomes that customers want to achieve,
without the customer having to manage specific costs and risks."

ITIL 4 Definition of a Service

"A means of **enabling** **value** **co-creation**
by facilitating outcomes that customers want to achieve,
without the customer having to manage specific costs and risks."

vs. **ITIL 3**

"A means of **delivering** value"

# ITIL 4 Definition of a Service – Breaking it Down

"A means of enabling value co-creation
by **<u>facilitating</u>** outcomes that customers want to achieve,
without the customer having to manage specific costs and risks."

Why Digital Transformation and Customer Experience Count

82% say that getting their issue resolved quickly is the number 1 factor to a great customer experience (LivePerson)

69% attributed their good customer service experience to quick resolution of their problem (Zendesk)
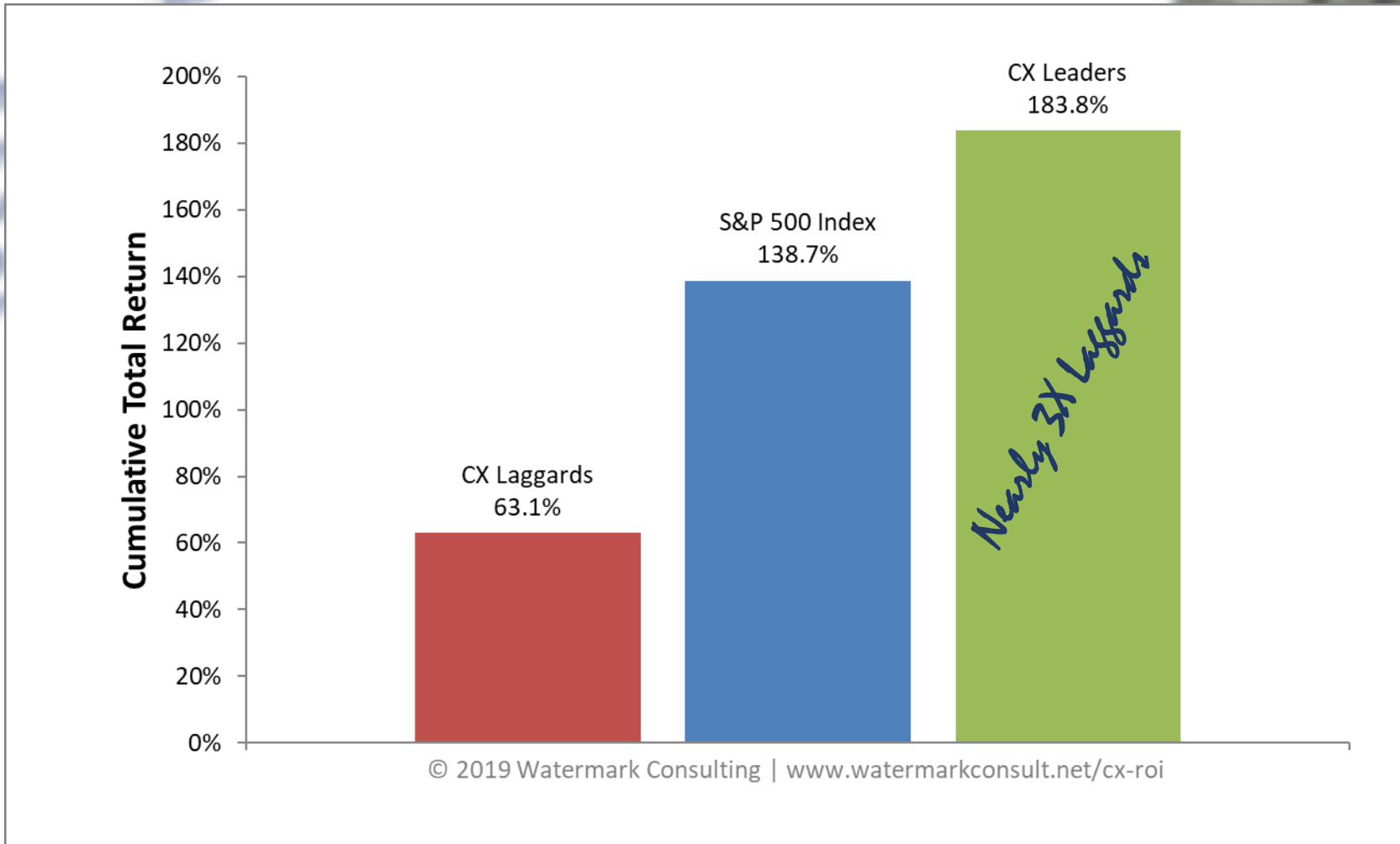
66% of B2B and 53% of B2C customers stopped buying after a bad customer service Interaction (Zendesk)

COSTS
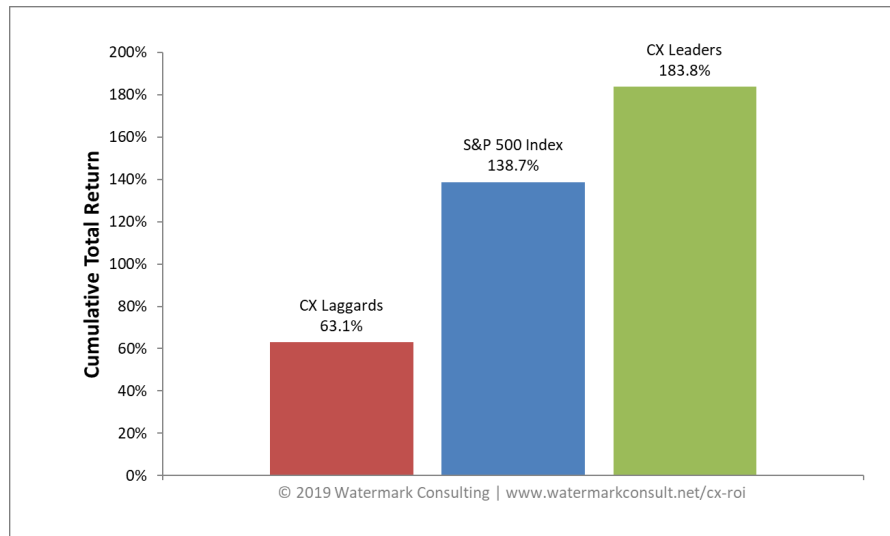
Leaders in omni-channel customer experience strategies average 7.5% year-over-year decrease in cost per customer compared with 0.2% for laggards

Aberdeen Research

CX Leaders
183.8%

S&P 500 Index
138.7%

CX Laggards
63.1%

Cumulative Total Return

200%
180%
160%
140%
120%
100%
80%
60%
40%
20%
0%

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Why Digital Transformation and Customer Experience Count

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Digital Transformation

ITIL 4 & other frameworks

CSAT & CX METRICS

$

ITSM

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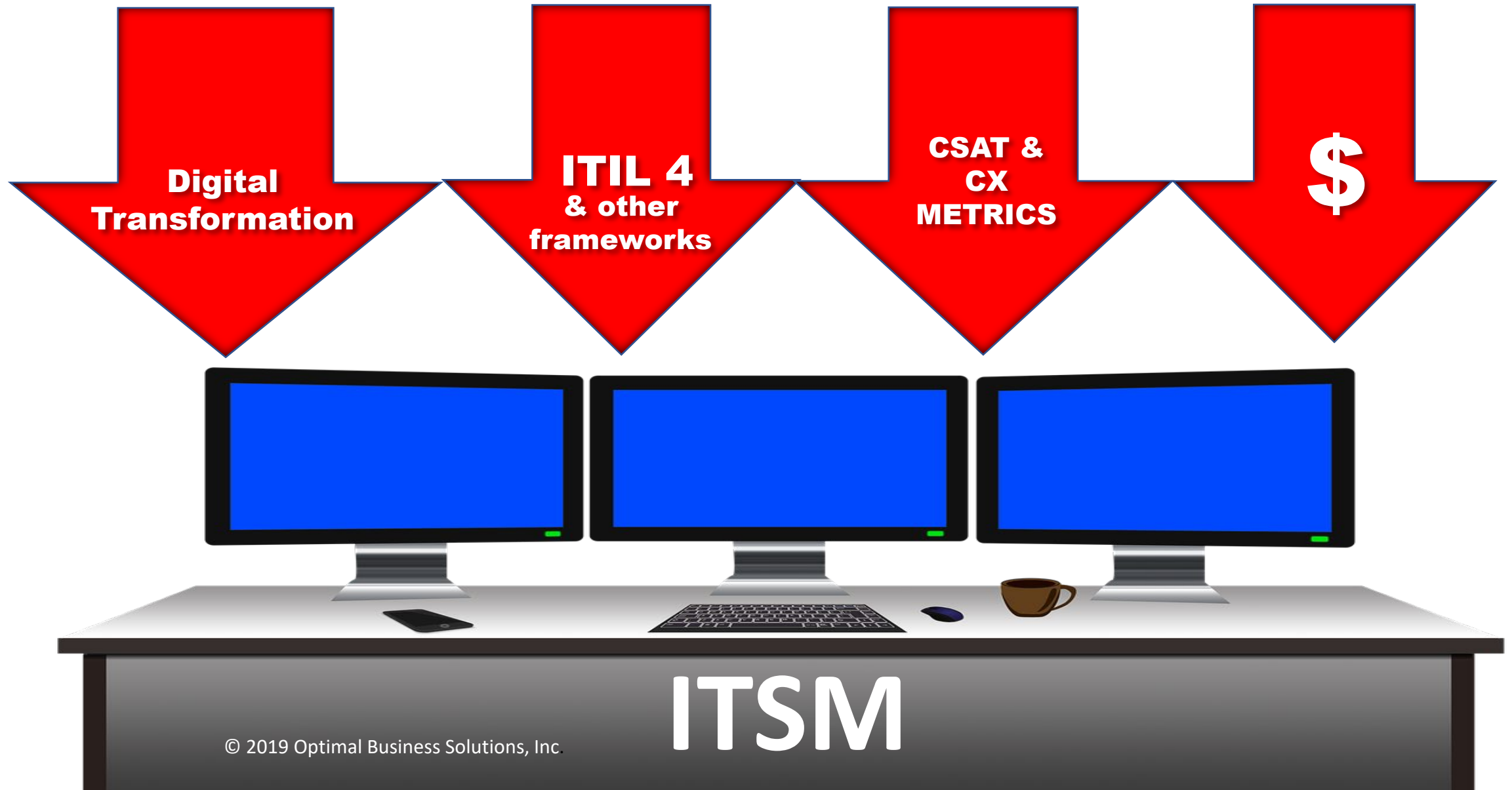
Adding to the Pressure...

"In 2018, CX performance was flat, and more than 50% of digital transformation efforts stalled.

89% of surveyed CX professionals state that the ROI of CX is not well established in their companies.
Forrester - Predictions 2019

"An Inconvenient Truth: 93% of Customer Experience Initiatives are Failing..."
Customer Think - February 7, 2018

To Course Correct, We Need to Understand…

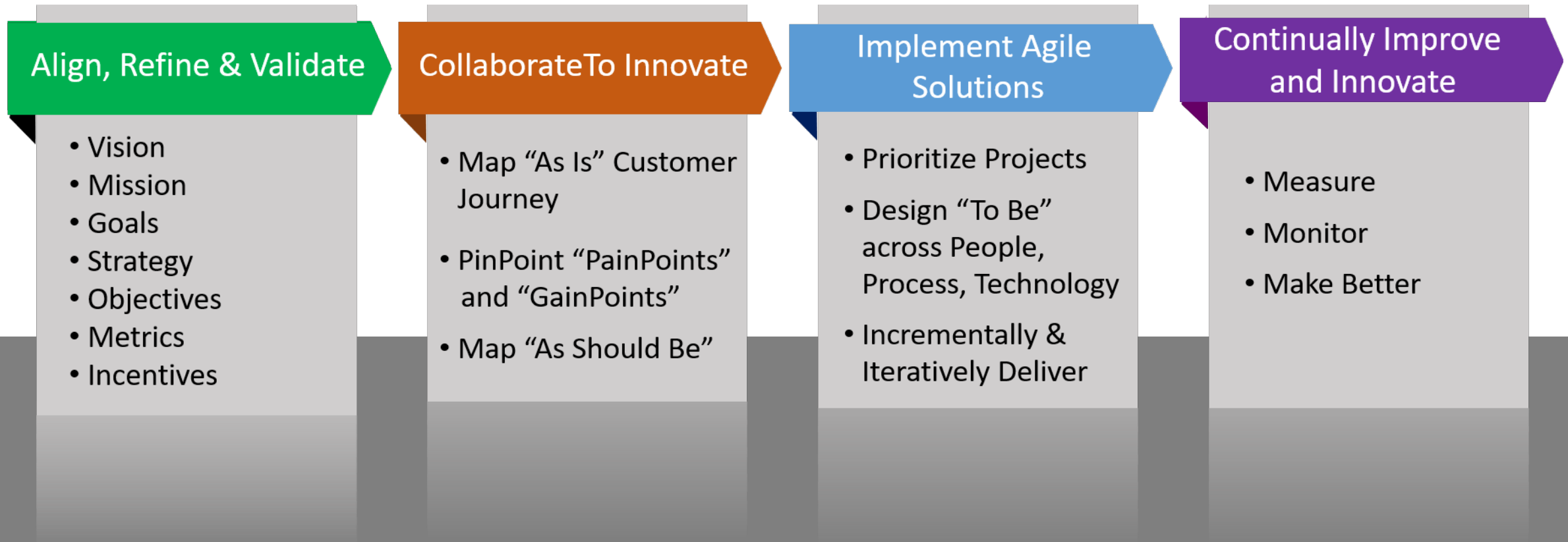| What Went Wrong	What Can Be Done About It
Building a business case on other companies' success metrics	Validate "Metrics that Matter" with coherent action plans to achieve them
Lack of Senior Management Commitment	Gain organizational traction through agile proofs of concept
Rush to implement "Silver Bullet" Technologies	Test the waters: Leverage legacy tech, process redesign, and training
Solutions that under/over-deliver to customers needs and wants	Gauge customer's desired outcomes, anticipate needs, & test to validate
Lack of organizational readiness And employee buy-in	Solutions designed by collaborative teams & delivered through integration of People, Process, Tech

OBSI's 4-Step Methodology to Putting SERVICE Back in ITSM

Align, Refine & Validate

- Vision
- Mission
- Goals
- Strategy
- Objectives
- Metrics
- Incentives

CollaborateTo Innovate

- Map "As Is" Customer Journey
- PinPoint "PainPoints" and "GainPoints"
- Map "As Should Be"

Implement Agile Solutions

- Prioritize Projects
- Design "To Be" across People, Process, Technology
- Incrementally & Iteratively Deliver

Continually Improve and Innovate

- Measure
- Monitor
- Make Better

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- ...int "PainPoints" ..."GainPoints"
- ..."As Should Be"

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Why it is So Important – A National Government Agency

Expected Result: "[Clients] have access to timely and accurate responses to their…enquiries"

KPI: "Respond to calls in the agent queue within two minutes 80% of the time"

Results:
- KPI Exceeded
- Over **19,000,000 calls** handled in a year

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However…

"While the Agency reported that it met its targets for both access and timeliness, its performance measures were incomplete and its call centres' results were overstated"

Auditor General of Canada
2017 Report on CRA Call Centres

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What Went Wrong?

KPI: Respond to calls in the agent queue within two minutes 80% of the time

Results:

Calls _Received_: 53.5 M

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What Went Wrong?

KPI: Respond to calls *in the agent queue* within two minutes 80% of the time

Results:

64% of Calls *BLOCKED*: 34.3 M

36% of Calls *ANSWERED*: 19.3 M

Align, Refine & Validate

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The Accuracy KPI

KPI: Percentage of accurately updated internal reference materials = 100%

Results:

36% of Calls _ANSWERED_: 19.3 M

Align, Refine & Validate

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- Incentives

The Accuracy KPI

KPI: Percentage of **accurately updated internal reference materials** = 100%

Results:

30% of Calls *ANSWERED*
By agents were
ANSWERED INCORRECTLY: 5.1 M

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In the End…

Of 53.5 M Calls Received

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In the End…

Of 53.5 M Calls Received

73.5% went unanswered or were answered incorrectly

Only 26.5% of them were answered…correctly: 14.2 M

Align, Refine & Validate
- Vision
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Aligning and Optimizing Goals & Metrics: CRA

VISION ...providing **unparalleled service and value** to its clients...

OUR PROMISE ...delivering world-class tax and benefit administration that is **responsive, effective, and trusted**

MISSION: ...administer tax, benefits, and related programs... contributing to the ongoing **economic and social well-being of Canadians**

OUR GUIDING PRINCIPLES:
Integrity...treating people fairly and applying the law fairly
Professionalism...committed to the highest standards of achievement
Respect ...being sensitive and responsive to the rights of individuals

CRA's Taxpayer Bill of Rights: The right to **complete, accurate, clear, and timely information**

7/3/19

What's Missing From Metrics?…The Customer's Perspective

- Vision
- Mission
- Goals
- Strategy
- Objectives
- Metrics
- Incentives

Expected Result: Individual taxpayers have access to timely and accurate responses to their tax enquiries

Examples

KPIs

Respond to a call in the agent queue within two minutes 80% of the time	→	**Sound Metric (Service Level)… But the calls that are blocked never make it to the agent queue.**
Add: Call Blockage < 5% by Q4	→	**Together with Service Level & sufficient funding for adequate trunks and staff, will drive Expected Result of Timely Responses**
85% of callers succeed in reaching the CRA (peak season)	→	• **But averaging 4 call attempts to get through** • **Need a customer "Level of Effort" metric** • **What happens to the "unlucky" 15%?**
Add: Increase First Call Resolution (FCR) by 20% by Q2 2020	→	**% of Calls Handled (by agents, by automation, and in total) that are fully & correctly resolved the first time**
Percentage of accurately updated internal reference materials = 100%	→	**Necessary but not sufficient. Base on successful customer outcomes (e.g., correct and complete information conveyed 98% of the time)**
Add: Reduce service requests by 10% by Q3 2020	→	**Achieved through root cause analysis and call prevention (e.g., education, self-care)**

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What's Often Missing?   ...The Employee's Perspective

Why it's important:

- **Business units in the top quartile for employee engagement outperform bottom quartile[1]**

10%

22%

21%

Customer Loyalty   *Profitability*   *Productivity*

[1] Gallup Meta-Analysis, "THE RELATIONSHIP BETWEEN ENGAGEMENT AT WORK AND ORGANIZATIONAL OUTCOMES", http://employeeengagement.com/wp-content/uploads/2013/04/2012-Q

- Vision
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Aligning and Optimizing Goals & Metrics
…What's Often Missing? The Employee's Perspective

Examples

Goal: Make My Life Better & Easier

Metrics, KPIs, Key Results

Increase employee satisfaction by 8% by EOY as measured by new monthly "Pulse" survey

Increase employee advancement by 6% by Q3

Increase employee referrals by 12% by Q4

Increase employee process improvement recommendations by 24% by Q3

Reduce Employee Attrition by 10% by Q3
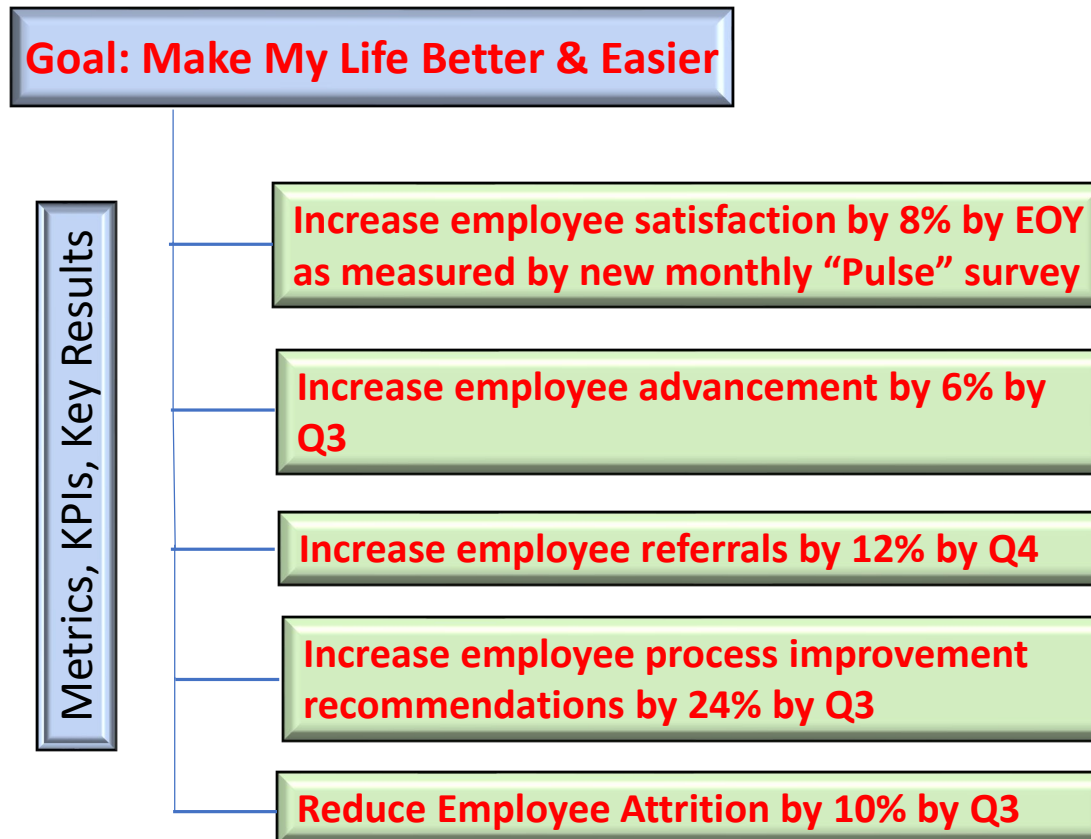
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Aligned and Refined
...Now, Make Sure That They Are Valid

- **Are they delivering optimal outcomes?**

- **Are metrics/incentives subject to manipulation?**

Please Take Down My Email Address...

mseeger@optimal-business.corn

Did You Notice Anything Strange?

mseeger@optimal-business.corn

How about now...?

mseeger@optimal-business.**corn**

- At one company, some CSRs were changing customer's email addresses when the caller was dissatisfied
- No CSAT surveys could be sent
- Email bounce rates were 20%

Align, Refine & Validate

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Time to Rethink Your Incentive Program?

In 2016 the largest bank in the US did:

"We are eliminating product sales goals because we want to make certain our customers have full confidence that our retail bankers are always focused on the best interests of customers."

CEO of Wells Fargo, John Stumpf
before US Congress

After:

- 3.5 Million bank and credit card accounts fraudulently created

In the end:

- 5,300 sales employees were fired
- The CEO stepped down
- $ Billions USD in penalties, & lawsuit settlements

3 Critical Success Factors to Remember...

1   Align all you do around Optimal Outcomes
for your customers (first) and then for your business

2   Be vigilant in inspecting for unintended consequences

3   Validate your metrics against actual outcomes
and customer behaviors

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Implement Agile Solutions
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Collaborate to Optimize ITSM, Customer and Business Outcomes

CollaborateTo Innovate

- Map "As Is" Customer Journey
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INPUTS

Aligned, Refined, Valid goals, objectives and metrics

Internal & External CSAT & ITSM Performance Data

Management commitment to customer focus, collaboration & employee empowerment

ACTIONS

Develop:

- "As Is" Customer Journey Map
- "Crucial Question"
- Communication Plan
- Analysis of Available "Voice of Customer" Data
- Collaborative "PinPoint the PainPoint" Sessions

OUTPUTS

- "As Should Be" Customer Journey Map – with Clearly Defined ITSM Deliverables
- Foundation for Action Plans to follow

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Begin with the "As Is" Customer Journey

CollaborateTo Innovate

- Map "As Is" Customer Journey
- PinPoint "PainPoints" and "GainPoints"
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Example: "QualiCar" Car Rental Company

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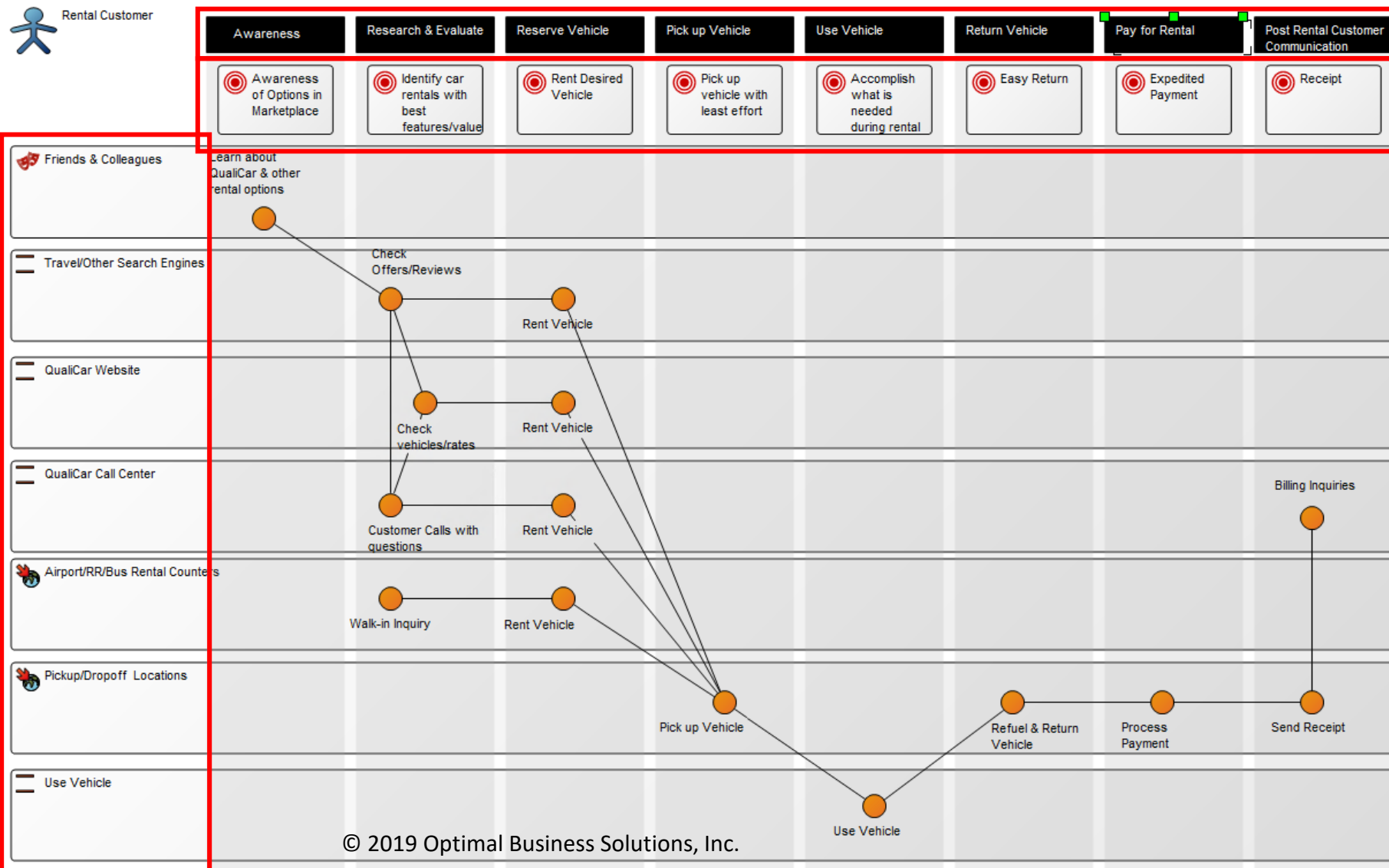
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Develop the "Crucial Question"

That focuses and energizes the organization

About every goal, strategy, initiative, and tactic, ask the **crucial question**:

"Will it deliver optimal customer outcomes that earn their loyalty?"

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Conduct Multi-Disciplinary "*PinPoint the PainPoints*" Sessions

- Map "As Is" Customer Journey
- **PinPoint "PainPoints" and "GainPoints"**
- Map "As Should Be"

Identify Pains and Gains for customers -- and other key stakeholders...

PainPoints

"Pains" **are those customer & other stakeholder experiences that thwart customers' desired outcomes**

GainPoints

"Gains" **are opportunities to deliver to the customers' desired outcomes**

...in the context of the customer journey
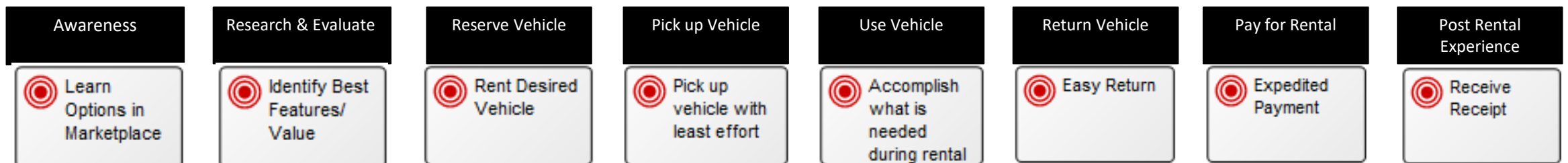
Awareness	Research & Evaluate	Reserve Vehicle	Pick up Vehicle	Use Vehicle	Return Vehicle	Pay for Rental	Post Rental Experience
◎ Learn Options in Marketplace	◎ Identify Best Features/ Value	◎ Rent Desired Vehicle	◎ Pick up vehicle with least effort	◎ Accomplish what is needed during rental	◎ Easy Return	◎ Expedited Payment	◎ Receive Receipt

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"Hands On" – Brainstorming Pains & Gains

"Will it deliver optimal customer outcomes that earn their loyalty?"

Awareness

Research & Evaluate

Use Vehicle

Return Vehicle

Reserve Vehicle

Pick up Vehicle

Pay for Rental

Post Rental Experience

Customers go to competitors when printer is down and I can't print rental contracts

"Hands On" – Brainstorming Pains & Gains

"Will it deliver optimal customer outcomes that earn their loyalty?"

Awareness

Research & Evaluate

Use Vehicle

Return Vehicle

Reserve Vehicle

Pick up Vehicle

All

Pay for Rental

Post Rental Experience

Customers go to competitors when printer is down and I can't print rental contracts

Please keep me posted about progress when my quoting system will be back up!
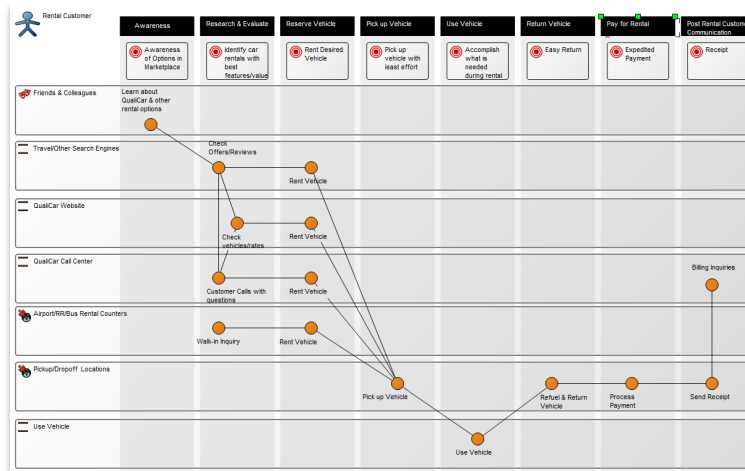
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Web Chat not working intermittently – Losing Sales!

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Customers go to competitors when printer is down and I can't print rental contracts

Heads up! Contracting with outside vendor for toll fee processing and billing

Pay for Rental

Post Rental Experience

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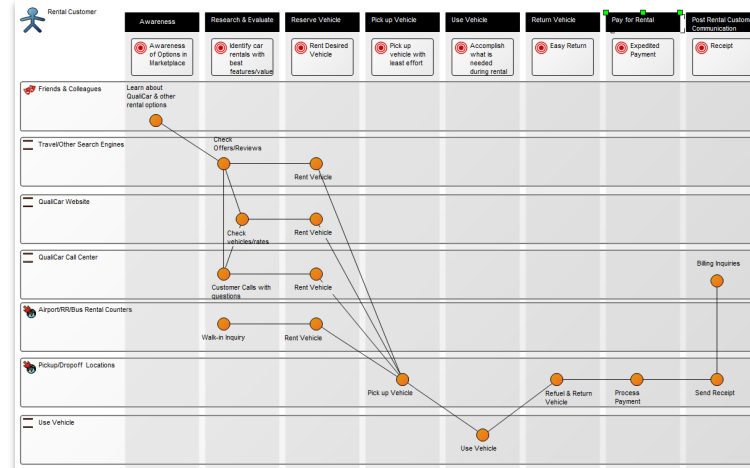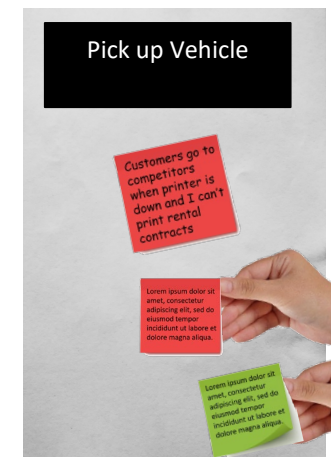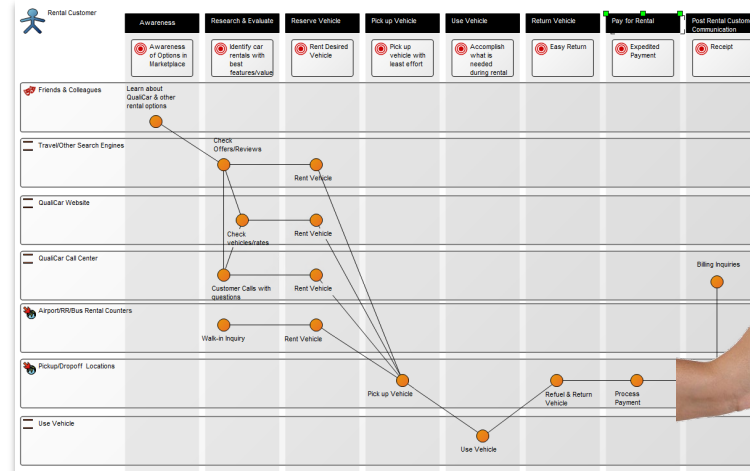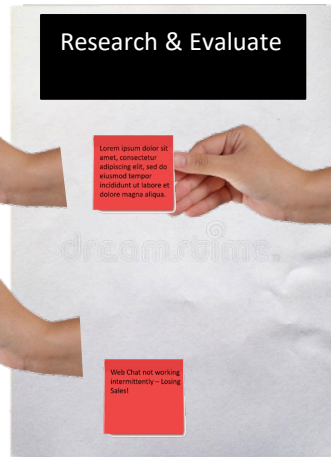
All the Service Desk Admins are courteous, but some just don't get it and waste my time

Pay for Rental

Post Rental Experience

Heads up! Contracting with outside vendor for toll fee processing and billing
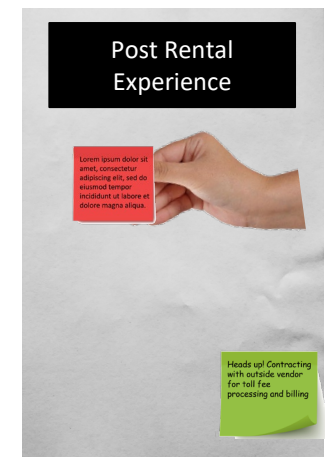
"Hands On" – Organize Solutions into Prioritized Initiatives

1. Enhanced service for our MVPs:

   a. Airport Pickup & Drop off where offsite locations
   b. Concierge service (e.g., snacks/drinks delivered with vehicle, dining & events arranged)
   c. No fill-up required on return – charge at gas cost

2. Training/Job Performance Aids

   a. Accelerate training & learning outcomes
   b. ITSM Knowledge Base -- replace "articles" with step-by-step guides
   c. Explore interactive troubleshooting guides for ITSM & its customers
   d. Introduce Quality Assurance (QA) evaluations and coaching
   e. Implement multi-channel Customer Satisfaction Surveys

3. Technology Enablers:

   a. Dispatching system for pickups/drop-offs
   b. Increase website & Chat SLAs to 4 9's
   c. Proactively update internal customers on incident resolution status via preferred channel
   d. Implement Problem Mgmt
   e. Build/Support QualiCar App
   f. Enable voice assistant ordering
   g. Vehicle RFID & Telemetrics for no wait checkout

- Map "As Is" Customer Journey
- PinPoint "PainPoints" and "GainPoints"
- Map "As Should Be"

Transforming the "As Is" Journey Map to the "As Should Be"

Rental Customer	Awareness	Research & Evaluate	Reserve Vehicle	Pick up Vehicle	Use Vehicle	Return Vehicle	Pay for Rental	Post Rental Experience
	⦾ Learn Options in Marketplace	⦾ Identify Best Features/ Value	⦾ Rent Desired Vehicle	⦾ Pick up vehicle with least effort	⦾ Accomplish what is needed during rental	⦾ Easy Return	⦾ Expedited Payment	⦾ Receive Receipt
Friends & Colleagues	Learn about QualiCar & other rental options ●							
Travel/Other Search Engines	Learn about QualiCar from Search ●	Check Offers/Reviews ●	Rent Vehicle ●					
QualiCar Website		Check Vehicles/Rates ●	Rent Vehicle ●					
QualiCar Contact Center		Customer Asks Questions ●	Rent Vehicle ●					Use Vehicle ●
Airport/RR/Bus Rental Counters		Customer Asks Questions ●	Rent Vehicle ●					
Pickup/Dropoff Locations				Pick up Vehicle ●	Refuel & Return Vehicle - Bus to Terminal ●	Make Payment ●	Use Vehicle ●	Use Vehicle ●
Use Vehicle					Use Vehicle for Intended Purpose ●			

- Map "As Is" Customer Journey
- PinPoint "PainPoints" and "GainPoints"
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"MVP" Business & Pleasure Customer

	Awareness	Research & Evaluate	Reserve Vehicle	Pick up Vehicle	Use Vehicle	Return Vehicle	Pay for Rental	Post Rental Experience
(Goals)	Learn Options in Marketplace	Identify Best Features/ Value	Rent Desired Vehicle	Pick up vehicle with least effort	Accomplish what is needed during rental	Easy Return	Expedited Payment	Receive Receipt
Friends & Colleagues	Learn about QualiCar & other rental options							
Travel/Other Search Engines	Learn about QualiCar from Search	Check Offers/Reviews	Rent Vehicle					
Social Media	Learn & Discuss Experience	Ask Questions/Read Responses	Post Comments/Read Responses	Post Comments/Read Responses	Post Comments/Read Responses	Post Comments/Read Responses	Post Comments/Read Responses	Post Comments/Read Responses
Advertising, Marketing, Branding, PR (e.g., TV, Radio, Print, DM, email, SMS, Online Ads, Community Forums, Newsletters)	Learn about QualiCar & Promos	Learn about QualiCar & Promos						Learn about QualiCar and Promos
Mobile App			Rent Best Vehicle for Needs/Profile	Notify QualiCar Ready to Receive Vehicle	Request Customer Service/Roadside Assistance	Request Vehicle Handoff at Airport	Authorize Payment	Make Billing Inquiries
Voice Assistant Ordering		Check Vehicles/Rates	Rent Best Vehicle for Needs/Profile					
QualiCar Website (FASTER/EASIER)		Check Vehicles/Rates	Rent Best Vehicle for Needs/Profile					Make Billing Inquiries
QualiCar Contact Center (e.g., IVR, Phone Agent, Chat, Chatbot, SMS, email) FASTER, SMARTER, BETTER		Customer Asks Questions	Rent Best Vehicle for Needs/Profile	Notify QualiCar Ready to Receive Vehicle	Request Customer Service/Roadside Assistance	Request Vehicle Handoff at Airport	Authorize Payment	Make Billing Inquiries
Airport/RR/Bus Rental Counters		Walk-in Inquiry	Rent Best Vehicle for Needs/Profile	Vehicle Delivered to MVP at Airport Terminal		Vehicle Picked up by QualiCar at Airport		
Pickup/Dropoff Locations								
Use Vehicle					Experience Added Value While Using			

"MVP" Business & Pleasure Customer

	Awareness	Research & Evaluate	Reserve Vehicle	Pick up Vehicle	Use Vehicle	Return Vehicle	Pay for Rental	Post Rental Experience
	Learn Options in Marketplace	Identify Best Features/ Value	Rent Desired Vehicle	Pick up vehicle with least effort	Accomplish what is needed during rental	Easy Return	Expedited Payment	Receive Receipt
Mobile App			Rent Vehicle	Notify QualiCar Ready to Receive Vehicle	Request Customer Service/Roadside Assistance	Request Vehicle Handoff at Airport	Authorize Payment	Make Billing Inquiries
QualiCar Contact Center (e.g., IVR, Phone Agent, Chat, Chatbot, SMS, email) FASTER, SMARTER, BETTER		Customer Asks Questions	Rent Best Vehicle for Needs/Profile	Notify QualiCar Ready to Receive Vehicle	Request Customer Service/Roadside Assistance	Request Vehicle Handoff at Airport	Authorize Payment	Make Billing Inquiries
Airport/RR/Bus Rental Counters		Walk-in Inquiry	Rent Best Vehicle for Needs/Profile	Vehicle Delivered to MVP at Airport Terminal		Vehicle Picked up by QualiCar at Airport		

Enhanced service for our MVPs:

Airport Pickup & Drop off where offsite locations

No fill-up required on return – charge at gas cost

CollaborateTo Innovate

- Map "As Is" Customer Journey
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- Map "As Should Be"

"MVP" Business & Pleasure Customer

	Awareness	Research & Evaluate	Reserve Vehicle	Pick up Vehicle	Use Vehicle	Return Vehicle	Pay for Rental	Post Rental Experience
	Learn Options in Marketplace	Identify Best Features/ Value	Rent Desired Vehicle	Pick up vehicle with least effort	Accomplish what is needed during rental	Easy Return	Expedited Payment	Receive Receipt
Mobile App			Rent Vehicle	Notify QualiCar Ready to Receive Vehicle	Request Customer Svc./Roadside Assistance	Request Vehicle Handoff at Airport	Authorize Payment	Make Billing Inquiries
QualiCar Contact Center (e.g., IVR, Phone Agent, Chat, Chatbot, SMS, email) FASTER, SMARTER, BETTER		Customer Asks Questions	Rent Best Vehicle for Needs/Profile	Notify QualiCar Ready to Receive Vehicle	Request Customer Svc./Roadside Assistance	Request Vehicle Handoff at Airport	Authorize Payment	Make Billing Inquiries
Airport/RR/Bus Rental Counters		Walk-in Inquiry	Rent Best Vehicle for Needs/Profile	Vehicle Delivered to MVP at Airport Terminal		Vehicle Picked up by QualiCar at Airport		
Use Vehicle					Experience Added Value While Using			

Enhanced service for our MVPs:

- Concierge service (e.g., snacks/drinks delivered with vehicle, dining & events arranged)
- Roadside Assistance

CollaborateTo Innovate

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Training & Job Aids

Leverage models/workflows to accelerate training & provide real time job aids to deliver best outcomes to our customers - FAST

A Real-World Application of One Solution...Revisiting the CRA

"...Agents told us it was a challenge to find information in the Agency's systems when responding to questions."

"Agents used about 29 different applications for the lines for individuals and about 25 for the lines for businesses"

Office of the Auditor General

My Experience: A Call to CRA Business Line

Question: "As a US citizen, what would my tax obligations be if I was to do consulting work for Canadian firms?"

		Duration
Waiting for Agents	13:00 for 1st Agent, 47:40 for transfer to 2nd agent	1:00:40
On Hold by Agents	Agent Researching	23:00
Agent Setting Follow up	Email and call back – Information was incomplete	8:15
Total Interaction Time	Discussion with Agent	22:00
Total Call Duration		**1:54:00**

Agent could not answer my questions and set up a call back

Return Call from CRA Business Line

Activity		Duration
Total Interaction Time	Discussion with Agent	8:15
Total Call Duration	**FOR BOTH CALLS**	**2:02:15**

- Agent seemed very thorough and knowledgeable. However he:
  - Missed a couple of key questions that would have disallowed a treaty exemption waiver
  - Corrected himself about the sequence of forms that need to be submitted

How This Call Might Have Been
Handled, Completely & Correctly, the First Time…
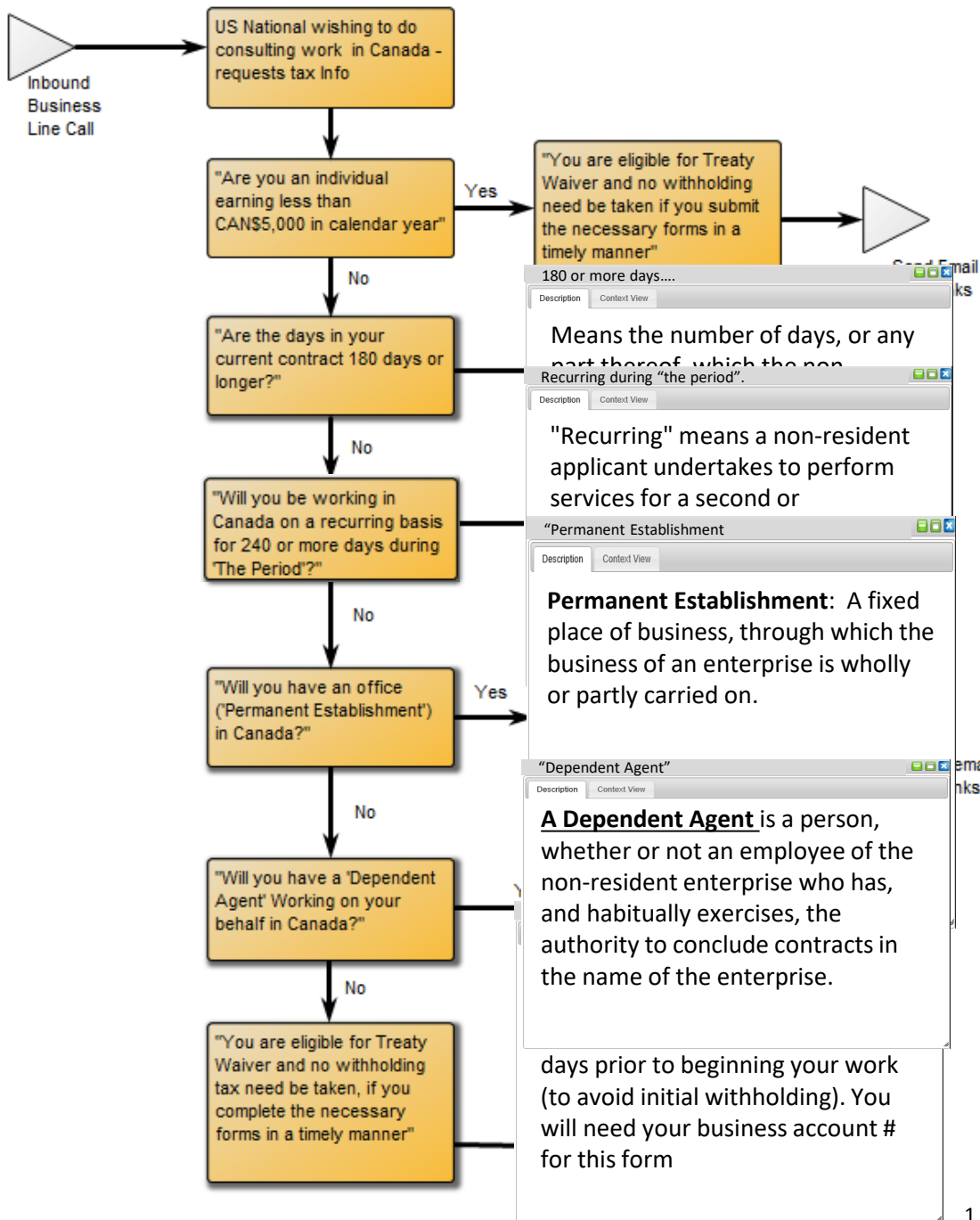
Sample[1] Real-Time Interactive Job Guide

Inbound Business Line Call

US National wishing to do consulting work in Canada - requests tax Info

"Are you an individual earning less than CAN$5,000 in calendar year"

Yes → **"You are eligible for Treaty Waiver and no withholding need be taken if you submit the necessary forms in a timely manner"** → Send Email

No ↓

"Are the days in your current contract 180 days or longer?"

No ↓

"Will you be working in Canada on a recurring basis for 240 or more days during 'The Period'?"

No ↓

"Will you have an office ('Permanent Establishment') in Canada?"

Yes →

No ↓

"Will you have a 'Dependent Agent' Working on your behalf in Canada?"

No ↓

"You are eligible for Treaty Waiver and no withholding tax need be taken, if you complete the necessary forms in a timely manner"

---

180 or more days....
Description | Context View

Means the number of days, or any part thereof, which the non

Recurring during "the period".
Description | Context View

"Recurring" means a non-resident applicant undertakes to perform services for a second or

"Permanent Establishment
Description | Context View

Permanent Establishment: A fixed place of business, through which the business of an enterprise is wholly or partly carried on.

"Dependent Agent"
Description | Context View

A Dependent Agent is a person, whether or not an employee of the non-resident enterprise who has, and habitually exercises, the authority to conclude contracts in the name of the enterprise.

days prior to beginning your work (to avoid initial withholding). You will need your business account # for this form

---

"The period" means the current calendar year, the three immediately preceding calendar years, and the three immediately following calendar years.

[1] Prepared by presenter, not a tax specialist, for Illustration purposes only

Implement Agile Solutions

- Prioritize Projects
- Design "To Be" across People, Process, Technology
- Incrementally & Iteratively Deliver

Implement Across People, Process, and Technology

Process

- ❑ Redesign processes to deliver desired customer and business outcomes
  - Eliminate non value-added processes
  - Eliminate unintended inconsistencies across customer touch channels
  - Create new value-added processes
- ❑ Establish Valid and Aligned Measures of Success
- ❑ Define internal & cross-team dependencies
- ❑ Establish feedback loops for customers and customer facing personnel

People

- ❑ Verify Solutions with Customers & Other Stakeholders
- ❑ Ready affected stakeholders for change: Communication Plan
- Realign Recognition and Incentive Plans
- Team members roles defined
- Refresh hiring practices
- ❑ Transparently share performance against new metrics across the enterprise

Technology

- ❑ Design innovative uses of legacy technology
- ❑ Find re-usable processes that can be automated
- ❑ Make well-reasoned incremental investments in new technology
- ❑ Design effective integrations across legacy and new technologies

Integration

Process

- ❑ **Redesign processes to deliver desired customer and business outcomes**
  - Eliminate non value-added processes
  - Eliminate unintended inconsistencies across customer touch channels
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- ❑ **Establish Valid and Aligned Measures of Success**
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OBSI's 4-Step Methodology to Putting SERVICE Back in ITSM

Align, Refine & Validate

- Vision
- Mission
- Goals
- Strategy
- Objectives
- Metrics
- Incentives

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Continually Improve and Innovate

- Measure
- Monitor
- Make Better

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CollaborateTo Innovate
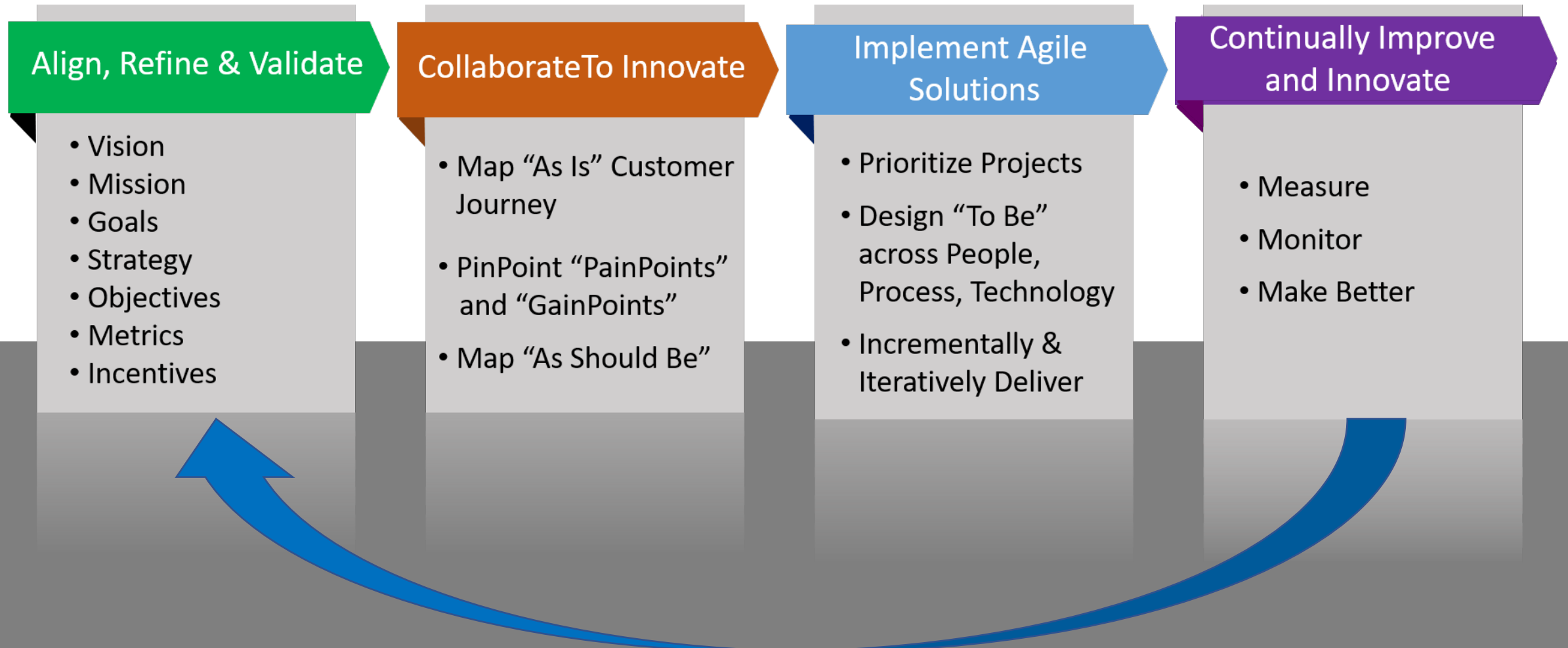
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Q&A

To Learn More...

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