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it **Service Management**
CONFERENCE



**Optimising service by improving
incident management**

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Optimising service through incident management

Who am I?

- Service Delivery Manager for Interserve Project Services Ltd (IPSL)
 - Delivery of service to internal customer
 - Customer relationship
 - Third party relationship
- Employment history:
 - 10+ years in service management (service desk, incident management, problem management, change management, service delivery management)
 - Background with IT service providers
- Background in ITIL and non ITIL environments
 - ITIL v2 Manager (Red Badge)

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Interserve Project Services Ltd (IPSL)

- Part of Interserve Group (Interserve PS, Interserve FS, RMD Kwikform)
- Group profit 2008: £83.7M
- IPSL
 - Construction
 - £39.7M profit 2008
 - Traditionally low profit margins in construction
- Focus on repeat customers
- PFI, Government agencies, private customers
 - Building Schools for the Future, NHS Procure 21, Highways Agency, MOD, HM Prisons Service, Thames Water, BT, Designed For Life: Building for Wales, Home Office
- Buoyant international division
 - Predominantly Middle East
 - Not currently using corporate IT systems (changing during 2009)
- Impact of the recession
 - Healthy pipeline, but...
 - Profit margins lower (traditionally low in construction away)
 - Cash is king

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A quick recap on 2008

- ◉ High call volumes in January and February
- ◉ Embarked on call reduction strategy
 - Identify the key areas for targeting.
 - » Trend analysis helps to verify what people can tell you (different groups have different answers)
 - Identify underlying causes and fixes.
 - Implement fixes via normal route
 - Analyse improvements – including backing some out if they don't work

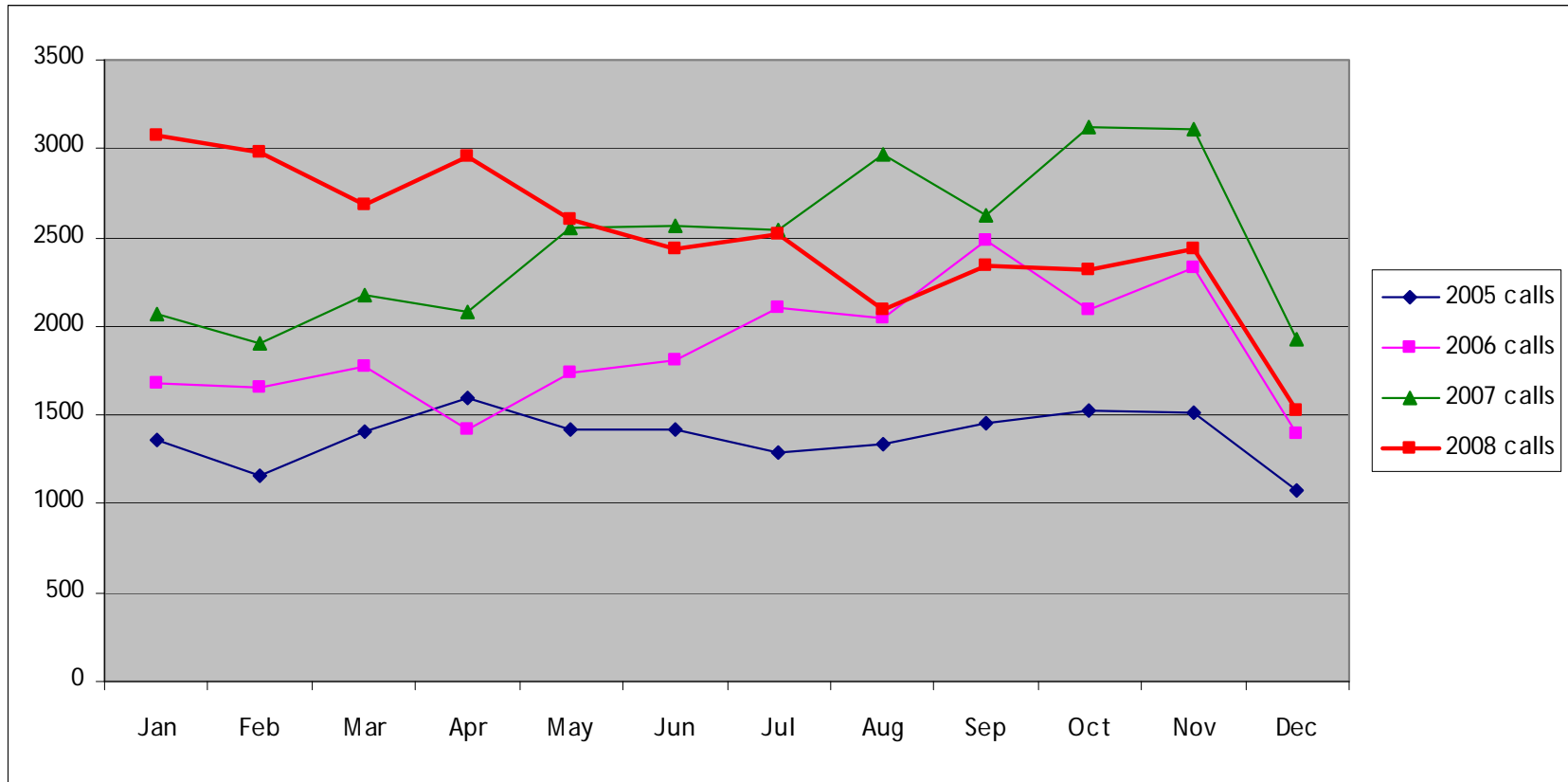
- ◉ There were constraints
 - Resources
 - Tool limitations
 - Quality of data
 - Incorrect assumptions

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Recap on 2008 continued

- ◉ We had our top 4 categories
 - 2 of them were left to one side
 - Focus on Citrix and our workflow routing tool
- ◉ We implemented some changes
- ◉ What did we achieve?
 - We reduced calls
 - We also targeted the ‘aging calls’ and reduced average open calls at month end by half

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So, where were we in January 2009?

- ◉ Some of our challenges were similar
 - New project releases leading to increases in calls
 - Gradual increase in calls as experienced staff leave and new staff start
 - Variable quality of data recorded in calls
 - Still some very old calls on the call tracking system (the oldest had been logged in September 2006)
 - Variable user perceptions of IT
 - No formal incident or problem management (which also compounded some of the other challenges)

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- ◎ Some of the challenges were new
 - Change in management structure
 - The Service Delivery Manager (me) issued a challenge to keep the month by month line below 2008 (easy in January, hard in August and September)
 - Quick closure (same working day) rate variable
 - Increasing volume of software installations and limited tools to process them
 - ‘User Knowledge’ became one of the highest causes of incidents (because we had addressed many technical problems)
 - The impact of the recession meant that expenditure had to be minimised

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- ◉ Which challenges could we address?
- ◉ Which challenges couldn't we address and why not?
- ◉ Which challenges would be easy to address?
- ◉ Which challenges would be more complicated?
- ◉ Which challenges were the most important?

Will talk about some of the challenges, their impact, what we did to address them, and how incident management affected them.

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The lack of incident management

- ◉ Incident Management was ad-hoc
- ◉ Why? Because the service desk didn't really have the time
- ◉ Why did it matter?
 - Unclear ownership
 - Incidents can slip through the cracks
 - Ageing calls (oldest call was from Sept 2006 – 28 months old)
 - Lack of detailed prioritisation (priority rules were out of date)

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How did we address the lack of incident management?

- ◉ A Service Desk team leader was appointed (from within the existing IT team), with responsibility for incident management
 - Chasing of old calls
 - Ensuring all calls are regularly updated
 - Ensuring that closure rules are followed (calls only closed with user agreement)
 - NB: some calls represented problems or enhancement requests rather than incidents, these were also in scope
 - This gave clear ownership to the incident management process
- ◉ Team leaders were appointed for the other operational teams (Second Line, Infrastructure, Systems Support)
 - Lines of escalation for those teams are clearer
 - Ownership of incident management for those teams

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- ◉ Regular review of incident stats
 - Team leaders meeting
 - » Team leaders have visibility of stats
 - Monthly KPI pack format altered
 - » All stakeholders can review stats that they need to see
- ◉ Overall, these actions gave us better visibility of the incidents and how they were being managed
 - Updates were better managed
- ◉ This helped us address the other challenges we faced too

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The challenge to keep calls below the 2008 line

- ◉ The Service Delivery Manager set the challenge that calls for each month in 2009 should remain below the number logged for that month in 2008.
- ◉ Why?
 - To ensure that we kept up the momentum of improving service that we built up in 2009
 - To avoid complacency (“We reduced calls, so we’re OK”)
- ◉ Was this realistic?
 - The SDM and the Operations Manager agreed that if user volumes increased by 10% then this would be taken into consideration

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How did we address this?

- By continuing the process we started in 2008
 - » Monthly trend analysis to identify key areas (eg, high number of 'user knowledge' related incidents)
 - » User feedback to identify key areas (eg, Citrix still causing user pain)
 - » Problem fix cycle (eg, develop a bespoke Citrix client to improve local config)
- Monthly meeting to discuss service improvement and call reduction strategies
 - » Reactive (items above)
 - » Proactive (eg, suggestions for health checks on some key services to identify problems before they impacted users)

How did improving incident management help?

- Better visibility of trends, including spotting them earlier
- Better feeling for what was causing the service desk pain

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Lack of user knowledge on key systems

- ◉ Why?
 - Project based focus of IT training, with some overviews given at new user inductions

- ◉ Why did it matter?
 - We identified User Knowledge as the main cause of incidents logged with our service desk, for example;
 - » Email users having problems managing their mailbox sizes
 - » Email users not familiar with our webmail service
 - » Citrix users not understanding the limitations of the service
 - » Automated workflow users not understanding how to navigate the system

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How did we address the lack of user knowledge?

- ◉ Produce more user guides and motion capture 'how do I?' guides
 - After that, you need to persuade the users to view them rather than just calling the service desk
- ◉ Work with the Training department to produce a training course covering key areas (Citrix, Outlook, workflow routing basics)
 - Regular discussions about the content we need
 - Sending the Training team regular breakdowns of the kinds of user knowledge calls we get
 - This is still ongoing, current target: pilot the course in September

How did incident management help?

- By helping to identify user knowledge call trends
- By representing the operational teams' frustrations

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Variable quality of data gathered by the call tracking tool

- ◉ What was the problem?
 - Priority rules out of date
 - Call categories out of date (eg 'pending' states)
 - Call statuses not always used effectively
 - Data entry not always of the highest quality
 - » Eg, calls logged as 'Citrix' because the user happened to be connected via Citrix
 - » 'Fixed all OK' as closure details

- ◉ Why did this matter?
 - Trend analysis results skewed
 - Live status statistics might not be accurate

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How did we address the problem of variable data quality?

- ◉ Re-designed the call categories
 - Simplified the list
 - Removed out of date categories
 - Removed duplicates
 - Added missing items
- ◉ Re-designed the call priority guidelines
- ◉ Re-designed the call status guidelines – this is still ongoing
- ◉ Challenging poor quality data entry

- ◉ How did incident management help?
 - By providing an escalation point to challenge poorly updated or managed calls
 - By ensuring the needs of incident management and the service desk were represented

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What pitfalls did we face in addressing our challenges?

- Major incidents can obscure other trends
 - Eg: we get reports of 'slow responses' on Citrix, often attributed to user knowledge or inadequate connectivity on site
 - We had a major network incident running for several weeks, which caused slow responses.
 - Therefore, the natural assumption (for users and IT staff) is that any slow responses are related to the known incident
 - How did we address this?
 - Not sure we did...
 - Once the major incident was resolved we had to remind users of the importance of reporting incidents to the service desk

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- Users are reluctant to report things they have reported before
 - They assume that 'IT know about it'
 - Incident management cannot pick up trends, so service cannot be improved
 - How can you overcome this?
 - Education, education, education
- No IT ownership of training
 - IT Training is owned by the Training department, which is part of HR
 - Therefore, IT cannot write or schedule courses
 - How did we overcome this challenge?
 - Its been a hard one, we started suggesting a general IT training course covering Citrix, Outlook, and the workflow routing back in about February
 - All we can do is work closely with Training, and make sure they are aware of the trends we see, and the user feedback we receive
 - As of writing, Training aim to pilot a course covering the key areas in late September
 - » Did this happen?

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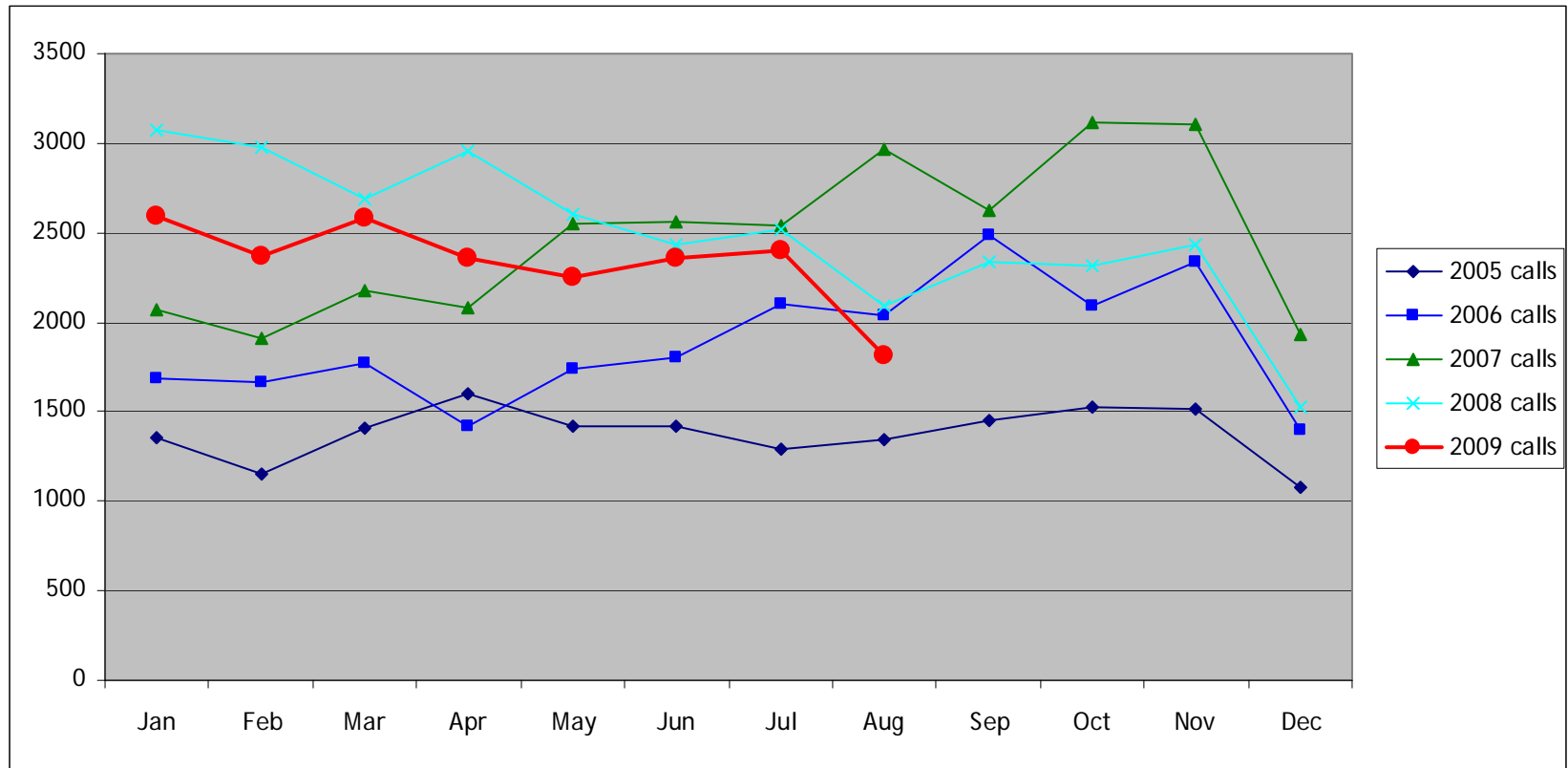
- Availability of resource for service improvement
 - IT resources taken up with BAU and projects
 - Always a challenge, service improvement can reduce the BAU work but finding time to do it can be hard
 - Training resources directed into projects
 - How did we overcome this?
 - The IT management team all accepted the need to improve service, which meant resource could be allocated
- Did incident management help us address these pitfalls?
 - Yes, because we had a clearer view of trends and therefore what was important

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What were our final results?

- ◉ Call age
 - As of 15/09, our oldest call was logged July 08 (nearly 2 years younger than the oldest one at the start of the year)
- ◉ Frequency of call updates
 - As SDM I regularly issue emails of old calls that haven't been updated 'recently'
 - » In April, there were 32 calls that I chased when doing this
 - » In June, it was 16
- ◉ Number of outstanding calls at month end
 - Still varies a lot, something we need to tackle more
- ◉ Quality of data
 - The time taken to carry out trend analysis was significantly cut
 - » New categories are easier to analyse
 - » Data quality is better
- ◉ Call volumes
 - Have kept the line below last year

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What was our user satisfaction like?

- ◉ No clear measures, as no surveys carried out
 - Complaint levels low
 - Generally good feedback at service reviews
- ◉ IT questions added to the general staff survey in 2009
- ◉ This becomes a future challenge...

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So in summary, we improved incident management.
How did this improve service?

- ◉ Calls were updated more regularly, which meant that users were kept up to date and therefore more likely to be happy
 - Expectations were being set
- ◉ Old calls were closed off (including some that were not really incidents but were covered), meaning that some lingering problems or requests were addressed
 - Our oldest call was logged July 08, making it 15 months old (oldest call at start of 2009 was 28 months old).
- ◉ Accuracy and data quality improved, which made trend analysis easier
 - This in turn allowed us to target other improvements

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What next?

- ◉ Continue to build on what we've achieved so far
 - Assist with training
 - Target improvements to keep calls down
 - Continue improving incident management
 - Introduce problem management
- ◉ Work with project teams to ensure that new services don't cause call volumes to rise again
- ◉ Look at user satisfaction and how to improve survey scores

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Questions / comments?