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"How to do service desk surveys brilliantly"
Presentation Outline for LEADit, August 2014

1. INTRO
- Icebreaker
- Introduce myself
- In next 45 minutes, I'm going to... (objectives, agenda, questions at end)
- Summarise key takeaways

2. WHY ARE SERVICE DESK SURVEYS IMPORTANT?

Customer's reality is their perception
- Perception is everything. Customer's perception is reality
- Customer perception is the true measure of VALUE
- A page of green traffic lights on response & resolution SLAs doesn't tell you anything about customer perceptions
- So, understanding how our customers perceive us is of vital importance and this is where surveys come in

Done well they can have a big impact on OVERALL customer sat
- For 99% of your customers, their perception of IT is shaped by their experience of support
- By adopting the recommendations I'll be sharing in this presentation, I'm seeing organisations achieve exceptionally positive feedback from their customers. Not only are their customers raving about the quality of IT support they receive but I've also seen an impressive jump in the overall satisfaction of IT as determined by periodic satisfaction surveys (share real example).

3. WHAT ARE THE COMMON PROBLEMS? (Top 10 list)

- 10. Not responsive / can't use on mobile / touch devices
- 9. Too many questions
- 8. Wording unclear
- 7. Scale not granular enough (e.g. ZenDesk)
- 6. Anonymous/not linked to a ticket
- 5. Not being able to calculate scores by team
- 4. Spamming users
- 3. Loop not closed
- 2. Not done at all
- 1. Not used to drive improvements (free consulting wasted).

4. RECOMMENDATIONS / HOW TO DO THEM WELL

How to IMPLEMENT them well
- Communicate, communicate, communicate
- Use ITSM capability or something like Survey Monkey
  - Ideally survey will be mobile device friendly
- Combine NPS with traditional experience questions & always ask 'how can we improve'
- Use tooltips to explain questions
- Choose your scale wisely
  - Prefer 0 to 10
  - Definitely not yes/no (thumbs/up down)
  - Explain pros & cons of 5 and 10 point scales.
- Don't make it anonymous - capture ticket number
  - Can link to customer and resolver/team and case history
  - Better quality of responses, otherwise get "You're crap" type responses.
- Be smart about when you issue survey
  - Every time = spam. Can be combated with comms
  - 1 in x = don't spam but may miss person who interacts infrequently
  - Every time but don't spam individuals
- Don't be afraid of incentives

How to USE them well
- Surveys can and should be put to a far greater use than just producing a customer satisfaction score)
- High visibility - Don't hide score & feedback score away in a management report
- Alerts/Call-backs
  - Clarify feedback
  - Show you are listening
  - Prevent issues from festering
  - Turn complaint into compliment
  - Avoid unnecessary escalations
  - Puts team leads back in touch with customer
- Trends in score
  - If you're already doing well, detect negative trends before they become an issue
  - See the impact of changes that you are making
- Learn where you need to improve (via correlation AND/OR mining for themes)
  - Read the feedback & count occurrences of themes
  - Correlate individual experience questions with overall satisfaction to understand what drives customer satisfaction
- Performance management
  - Recognise/reward strong performance, e.g. sharing positive feedback
  - Compare performance of teams & identify those who need help
- Benchmarking
- Marketing IT

5. CLOSE

- Recap benefits
- Call to action
  - Service Desk Surveys are vitally important and, when done well, can have a dramatic impact on the overall level of satisfaction that an organisation has with its IT department.
  - Many organisations already do them, but most are not enjoying the full benefit
  - Improving this CSI mechanism represents seriously low hanging fruit!
- Thanks. Questions?