

Desktop Support Customer Feedback Sessions

Process, Sessions, and Lessons Learned
Presented by Tracy Ray

What is a feedback session?

- Face-to-face dialog & brainstorm with customers
- Structured improvement activity
 - Experienced & skilled facilitator
 - Specific goals
 - Multiple small teams (ideally, ≤ 12)
 - Brainstorming & discussion activities
 - Short 1-hour sessions
- Broad representation across sites
- Customers do the talking, we do the listening



Our Sessions to Date



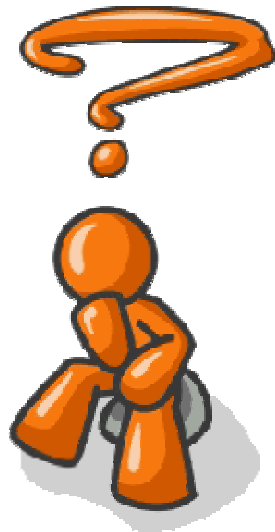
CUSTOMER SERVICE

- Excellent
- Very Good
- Good
- Average
- Poor



Planning

- Determine goals for the project
(what do we want from our customers?)
- Determine audience
- Create brief survey for broad audience
- Determine number of sessions, timing, & locations
- Select facilitator



Desktop Support Survey



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IMPORTANT: This survey is about your experiences and expectations with UNCLASSIFIED computing support at Sandia, including physical desktops, DaaS, Mobility, LOFT, and more.

Thinking about your unclassified computing experiences and expectations, which of the following are most important to you? Check all that apply.

- Having multiple ways to get help (e.g., phone, eTicket, chat)
- Frequent communication with support staff
- Resolution of my ticket with my first call
- Courteous support staff
- Expert and knowledgeable support staff
- In-person, walk-up support
- Minimum disruption to my work
- Self-help access to tools and info to help me fix my problem
- Automatic backup of my data to keep it safe
- Secure and easy-to-access data storage on the network
- Tiered support options (subscription/fee-based elevated desktop support)
- Support on travel
- Support when telecommuting
- Software patches and version updates
- Hassle-free ordering and delivery of computer hardware and software
- Specify your own value:

Of that same list, select the THREE things that need the most improvement.

- Having multiple ways to get help (e.g., phone, eTicket, chat)
- Frequent communication with support staff
- Resolution of my ticket with my first call
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- Specify your own value:

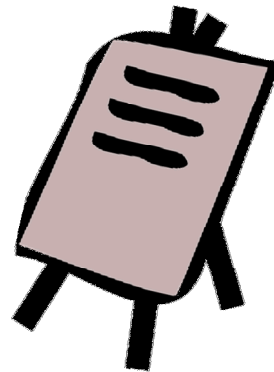
Do you have additional comments about Sandia's unclassified enterprise computing support services? Add them here.

We will be conducting focus groups in the near future to learn more about our customers' experiences and expectations of our computing support services. Are you interested in participating? If you choose YES, we will contact you when we schedule them.

- Yes
- No

Preparation

- Send survey to broad audience (includes an option for feedback session invite)
- Gather, review, & compile survey results
- Schedule rooms
- Establish signup site
- Send sessions invitation to interested participants
- Create posters/signs & gather facilitation material



Desktop Support Signup Page



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To sign up for a focus group, click the **new item** link below. Select the session you wish to attend (listed below), provide the other information, and click **OK**.

- (01) Tuesday, July 12, 1:30-2:30, (limit 15)
- (02) Wednesday, July 13, 2:00-3:00, (limit 15)
- SESSION FULL: (03) Thursday, July 14, 9:30-10:30,
- (04) Monday, July 25, 10:00-11:00, (limit 15)
- (05) Thursday, July 28, 10:00-11:00, (limit 15)
- (06) Tuesday, Aug 2, 9:30-10:30, (limit 15)
- (08) Tuesday, Aug 9, 2:00-3:00, (limit 15)
- (10) Thursday, Aug 11, 1:30-2:30, (limit 15)
- (12) WAIT LIST ME: Select this if your preferred session is closed. We will contact you when a spot opens up.

[+ new item](#)

✓ Edit	Session	Name	Org
	▾ Session :	(01) Tuesday, July 12, 1:30-2:30,	(limit 15) (9)
	▾ Session :	(02) Wednesday, July 13, 2:00-3:00,	(limit 15) (6)
	▾ Session :	(03) Thursday, July 14, 9:30-10:30,	(limit 15) (8)
	▾ Session :	(04) Monday, July 25, 10:00-11:00,	(limit 15) (6)
	▾ Session :	(05) Thursday, July 28, 10:00-11:00,	(limit 15) (12)
	▾ Session :	(06) Tuesday, Aug 2, 9:30-10:30,	(limit 15) (9)
	▾ Session :	(08) Tuesday, Aug 9, 2:00-3:00,	(limit 15) (7)
	▾ Session :	(10) Thursday, Aug 11, 1:30-2:30,	(limit 15) (5)

Feedback Sessions

- Generally, follow value stream process: current, ideal, future states with some variations from topic to topic
- Pick big rooms with plenty of wall space
- Offer a mix of days-of-the-week, locations, & times
- Include/reference survey results to jump-start or facilitate discussion
- Set expectations, ground rules, & time limits
- Avoid rabbit-holes by using a ‘Parking Lot’
- Prepare for conversation lulls with additional examples & questions
- Welcome positive as well as negative feedback (“What IS working?”)

Desktop Support Session Agenda

Session Agenda

Introduction & Logistics

10 minutes

Plotter-size printout of survey results by question to post in “unused” wall space (i.e. space you don’t need to physically access during the session)

Ground Rules pre-printed and posted in “unused” wall space

Dedicate wall space with several empty pages posted for two discussion areas – this is the space you will be using and working from during the discussion: should be viewable by participants and accessible by you

Use flip chart to capture “why were you interested in coming today” – as bullets w/out names; post on “unused” wall space

Facilitator Introduction, Thanks & Welcome

Goals:

- These sessions are aimed at helping the Unclassified Desktop support team improve and potentially expand our services
- We need your help to ensure our services continue to address YOUR needs and that we address any existing gaps in our service
- This session is an information-gathering session to capture YOUR ideas and thoughts

Introductions

- Name
- Department
- What do you do?
- Why were you interested in coming today?

Your job today:

Think creatively. Be honest and open. Be an active participant and share your ideas and thoughts freely! Your opinion and ideas matter to us!

Review ground rules

- Everyone participates
- Express your ideas as quickly and concisely as possible; we have limited time to cover a lot of ground
- Minimize rabbit-hole discussions
- Be respectful:
 - don’t interrupt
 - step out of the room to use mobile devices
 - limit side conversations

Let’s discuss our current services

20 minutes

Present results from survey question #1

Discussion/Idea Capture

The first activity you’ll be participating is a discussion about current desktop services.

- How do you request assistance? (goal: understand customer use of CCHD)
- What is important to you?
- What do you like about our services? Why?
- What don’t you like? Why?

What’s next for desktop support?

20 minutes

Present results from survey question #2

Discussion/Idea Capture

What could we do differently?

- What new services would you like to see?
- How can we help you succeed?
- If you could pick one area you’d like to see a change, it’d be.....

Thank You & Close-Out

5 minutes

Desktop Customer Service Lessons Learned

- Avoid scope creep
- Be mindful of timing – conducting feedback sessions on the future of our service during a time when our service was declining limited suggestions (“Fix what’s broke first!”)
- Who joins the session? Limit non-participant attendance (observers, project leads, managers)
- Assign an experienced facilitator who is able to...
 - Manage the agenda and time well
 - Adjust to variances in tone from session-to-session (starting off on the ‘wrong foot’ steered the discussion in one of our sessions and resulted in some unexpected outcomes)
 - Manage introvert/extrovert participation and adjust to variances in tone from session-to-session
 - Inspire creative thinking
- Avoid the unexpected “Genius Bar” outcome
- Encourage administrative staff to attend – these participants provided the most comprehensive view of our customers’ experiences!
- Carefully consider the volume of sessions necessary – very little new information was captured after about 4 sessions for this topic (see second bullet)

Mobility Service Session Agenda



AGENDA & TALKING POINTS

User Discussion Group – Sandia Mobility Services

Introduction & Logistics

15 minutes

Plotter-size printout of survey results by question to post in “unused” wall space (i.e. space you don’t need to physically access during the session)

Ground Rules pre-printed and posted in “unused” wall space

Post [RightPath](#) Mobility statement (pre-printed) in “unused” wall space

Dedicate wall space with several empty pages posted for two discussion areas – this is the space you will be using and working from during the discussion: should be viewable by participants and accessible by you

Use flip chart to capture “why were you interested in coming today” – as bullets w/out names; post on “unused” wall space

Facilitator Introduction, Thanks & Welcome

Goals:

- These sessions are aimed at helping the Mobility Services team develop our mobility strategy
- We need your help to ensure our strategy addresses YOUR needs and addresses any existing gaps in our service
- This session is an information-gathering session to capture YOUR ideas and thoughts

Introductions

- Name
- Department
- What do you do?
- Why were you interested in coming today?

Your job today:

Think creatively. Be honest and open. Be an active participant and share your ideas and thoughts freely! Your opinion and ideas matter to us!

Review ground rules

- Everyone participates
- Express your ideas as quickly and concisely as possible; we have limited time to cover a lot of ground
- Minimize rabbit-hole discussions
- Be respectful:
 - o don’t interrupt
 - o step out of the room to use mobile devices
 - o limit side conversations

What is Mobility?

2 minutes

To kick-off our discussion today, I’d like to read you an excerpt from “Mobility” regarding mobility services:
The drive toward enabling mobility is not centered on mobile devices. Mobility in IT refers to having access to perform work from anywhere, which includes portable devices and working on the move, but it also includes working from home, at the hotel, and from the office down the hall when you’re collaborating with others away from your desk, often on devices which aren’t necessarily portable. Mobility-enabling business processes, applications and communications is the next evolutionary step following the movement to web-enable applications and data over the past two decades. “Mobility” [Powerpedia](#) article; August 27, 2012

Ideal State

15 minutes

Discussion/Idea Capture

Idea generators:

For example, a new technology is document or photo transfer by touching phones – what if engineers could deliver updated drawings to lab technicians by touching their mobile device to another and the drawing appear instantly.

Or what if you were able to perform work tasks (beyond checking email) on the bus as you ride into work or while you wait for a flight at the airport. What kind of work could you imagine doing? Perhaps creating/editing documents, submitting an expense report, participating in a virtual/visual meeting?

The first activity you’ll be participating is a discussion about “ideal” mobile services, information access, and technology. Think beyond your current experience with mobility services at Sandia. Think of the “what if” for your mobility use. Imagine how mobile access, technology, devices, could be used in your day-to-day work to enhance your work experience, to make your work activities more accessible, to make your deliverables easier to deliver/complete, etc.

Consider how you use your mobile devices at home or any “cool” technologies you’ve ~~coo~~ and ~~as~~ at that you saw in television ads. Could those technologies be helpful at Sandia?

Future Services

20 minutes

Discussion/Idea Capture

Now, given our discussion about what “mobility” is and what “ideal” technologies, access, etc. might be desirable at Sandia, we’d like your help in prioritizing and defining what areas we should focus on in the next phase of Mobile Services at Sandia. To do that, we’ll spend the remainder of today’s session talking about our future services.

Refer to Survey Results as necessary

Most of you responded that accessibility and access to calendar and email are the top drivers for your mobility use. It’s clear how important these services are to most mobility users. However, considering increased productivity and job effectiveness are the next highest rated drivers, what additional mobility services or technologies could be offered to improve your productivity and job effectiveness?
capture

Are there instances in which mobility services could help you meet your customers’ expectations (point-out customers’ expectations results as the next most selected answer)? How? Are there instances in which you are or could be delivering products or services to your customers *using* mobile devices or services?
capture

What Sandia applications would you like to use on your device(s) that you don’t currently? Are there additional apps you’d like to use that we don’t have at Sandia?
capture

What are your main frustrations with the current Mobility Service? (Refer to “things that cause you the most frustration” results.)
Draw discussion from survey answers and capture discussion points

Any final thoughts about what mobile technologies, access or services are missing at Sandia? Any opportunities for improvement you’d like to share with the Mobility Services team?
capture

Thank You & Close-Out

5 minutes

Remote Access Service Session Agenda



AGENDA & TALKING POINTS

Focus Group – Remote Access Services

Introduction & Logistics

12 minutes

Plotter-size printout of survey results by question to post in “unused” wall space

Ground Rules pre-printed and posted in “unused” wall space

Definition and examples of Remote Access services pre-printed and posted in “unused” wall space

Dedicate wall space with several empty pages posted for two discussion areas

Use flip chart to capture “why were you interested in coming today” – as bullets w/out names; post on “unused” wall space

Facilitator Introduction, Thanks & Welcome

Goals:

- Follow up to Remote Access Survey from last week of February
- Your feedback from the survey and these focus groups will help the Remote Access team develop their strategy
- We need your help to ensure the strategy addresses YOUR needs and addresses any existing gaps in the service
- This session is an information-gathering session to capture YOUR ideas and thoughts in a structured way
 - Frustrations
 - Future Services/Ideal State
 - Prioritization of Future Services/Ideal State

Introductions

- Name
- Department
- What do you do?
- Why were you interested in coming today?

Your job today:

Think creatively. Be honest and open. Be an active participant and share your ideas and thoughts freely! Your opinions and ideas matter to us!

Review ground rules

- Everyone participates
- Express your ideas as quickly and concisely as possible; we have limited time to cover a lot of ground
- Minimize rabbit-hole discussions
- Be respectful:
 - don't interrupt
 - step out of the room to use devices
 - limit side conversations

What is Remote Access?

2 minutes

To kick-off our discussion today, I'd like to tell you what we mean when we say Remote Access Services.

- Read the definition and examples from the poster on the wall

Frustrations

14 minutes

Discussion/Idea Capture

Idea generator:

Project enhancements/ improvements/ enablers?

Let's start by talking about what drives your use of Remote Access services/

Refer to Survey Question 1 results as necessary

capture

[There are post-its around the table—if you think of things after we've moved on, don't hesitate to write your idea on a post-it and stick it to the appropriate poster. Even if we can't discuss it here, we want to capture your thoughts.]

Future Services/Ideal State

14 minutes

Discussion/Idea Capture

Idea generator:

What if there were a way for you to connect to your data at Sandia remotely that doesn't exist now?

Now, given our discussion about what “remote access” is at Sandia and what “ideal” technologies, access, etc. might be desirable at Sandia, we'd like your help in prioritizing and defining what areas we should focus on in developing Remote Access services at Sandia. To do that, we'll spend the remainder of today's session talking about our future services.

Refer to Survey Question 2 results as necessary

Most of you responded that ability to access resources from anywhere at any time was the top driver for your use of remote access services. It's clear how important these services are to most users. However, considering increased productivity and job effectiveness are the next highest rated drivers, what additional services or technologies could be offered to improve your productivity and job effectiveness?

capture

Are there instances in which remote access services could help you meet your customers' expectations (point-out customers' expectations results)? How? Are there instances in which you are or could be delivering products or services to your customers using remote access services?

capture

What are your main frustrations with the current remote services? (Refer to “things that cause you the most frustration” results.)

Draw discussion from survey answers and capture discussion points

Any final thoughts about what remote access technologies, access or services are missing at Sandia? Any opportunities for improvement you'd like to share with the Remote Access team?

capture

Prioritization of Future State/Ideal Services

15 minutes

Engage group to put ideal services in a prioritized order.

Thank You & Close-Out

3 minutes

