SAND2019-4813C

Service & Contract Management through a Balanced Scorecard

NLIT Summit 2019

PRESENTED BY

Goldie Mitchell and Tracy Ray

Goldie Mitchell

Service Manager of the Metrics and the SQ&I Team

Knowledge Management Process Manager

505/284-3035

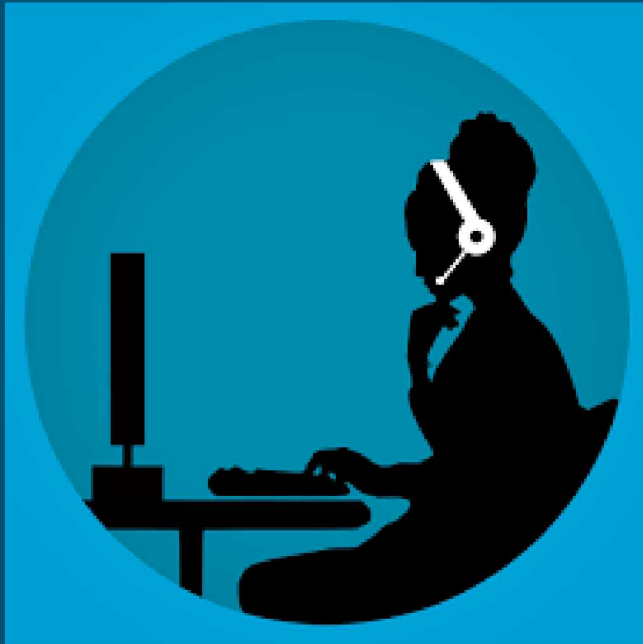sglawre@sandia.gov

Tracy Ray

Solutions Architect – CIO Portfolio Management

Previously: Metric Team & Service Manager with Enterprise End-User Services
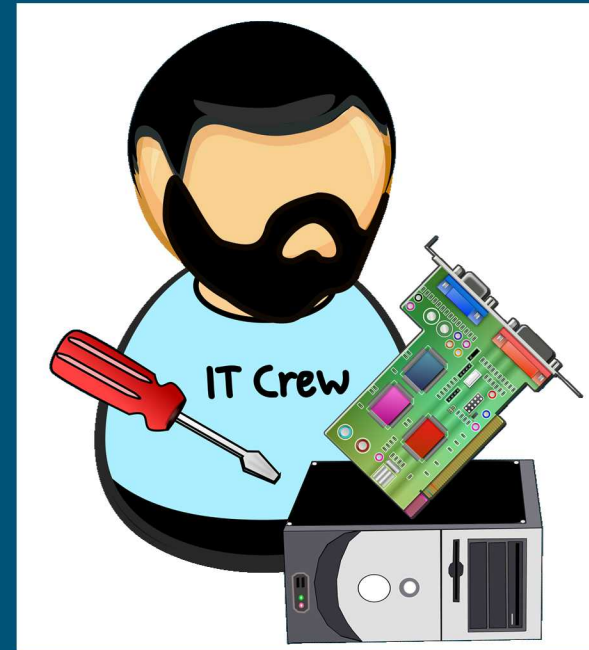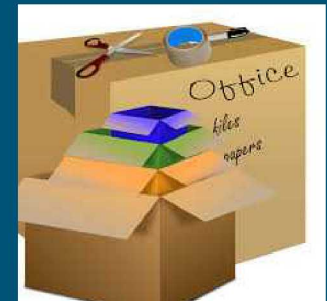
505/284-9824

tlray@sandia.gov

Please note: All the measure that you see are with example data and not actual performance metrics

Service Desk (60%+ Volume)


Deskside Support

Specialty Services

Where We Started

Contract Service Level Agreements (Years 1-5) – 40+ Metrics

- Contractor Compliance
- First Contact Quality (Service Desk/CSAT)
- Response Time for Incidents
- Response Time for Service Requests
- Resolution Time for Incidents
- Resolution Time for Service Requests
- Backlog Management
- Contractor Stability & Scalability

What 'Balanced' Meant to Us – Our Measurement Goals
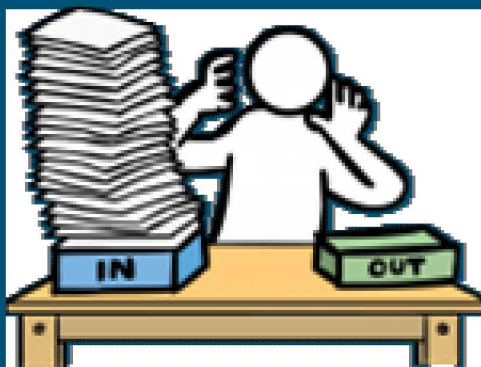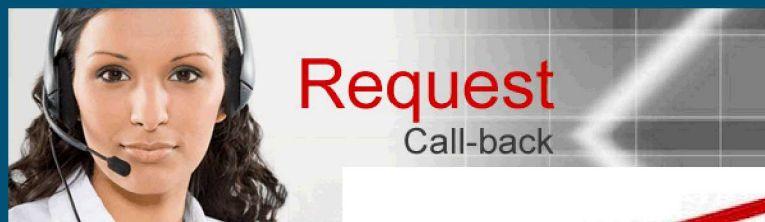
Represent the health of our organization and services across multiple critical measures

Weigh these critical measurement areas based on customer value and risk

Increase Sandia Service Manager oversight by service

Define service-relevant metrics and targets through joint agreement

Roll-up by-service metrics for contract CPIs (vs. assigning a CPI to a single metric)

Weigh service metrics based on customer value, risk, & volume

Create dashboards with compliance indicators

Strive for the 'right' measures of our services and contract

Critical Measurement Areas

Safety & Security

Contract Staffing

Service Delivery
9 Services

Quality
Customer Service
Knowledge Mgmt

Defining Balance Scorecard Measures

Safety & Security

- Security Incidents
- Device Accountability

- Safety Incidents
- Preventative Occurrences

Staffing

- Backfill

- Vacancy
- Compliance Training

Service Delivery

- Help Desk (CCHD)
- Deskside NM
- Deskside CA
- Mobility
- Builds
- LOFT
- Remote Services
- Classified
- Linux/Unix

More on this soon...

Quality

- Help Desk (CCHD)
- Deskside NM
- Deskside CA
- Mobility
- Builds
- LOFT
- Remote Services
- Classified
- Linux/Unix

- Customer Satisfaction

- Knowledge Utilization

Filling Our Scorecard with Measures

Determined baselines for ***each*** metric by calculating 12 month averages – resulting in dozens and dozens of metrics to review, adjust, and validate

Service Managers and Contractor Managers worked together to establish measures and targets

Made many adjustments during pilot and initial production release….

Some service metrics determined not applicable (example: Moves service only addresses Service Requests, so Incident measures excluded)

Metrics team built and validated dozens of metric reports while also creating and populating each scorecard

			Services	
Metric	Contract	CCHD - Service Center	Unclassified Deskside Support (CSU's)	(CCHI
Employee Engagement	X			
Safety Incidents				
Security Incidents				
Delivery Metrics				
Abandonment Rate				
Average Speed to Answer (ASA)				
Backfill **(Delivery component)**				
Backlog				
Counter Visit				
Deskside Visit				
First Call Resolution **(Delivery component - "Gross")**				
Knowledge Utilization				
MTRS - Incidents - by priority				
MTRS - Service Requests - by priority				
Remotely Resolved				
Resolution Rate				
30 day - Incidents				
30 day - Sevice Requests				
Quality Metrics				
CSATs				
First Call Resolution **(Quality component - "Net")**				
Re-open Rate (rework)				
Transfer Rate				
Cost Metrics				
Backfill **(Cost component)**				
Cost per ticket - resolved				
Cost per - deskside visit				
Cost per - counter visit				
Cost per - contact				
Cost per - chat				
Cost per - minute handle time		X		
Cost per - First Call Resolution		X		

Creating by-service scorecard content was very iterative and took several weeks of collaboration and negotiation across 9 services

By-Service Scorecards

Service

Area	Measure	Metric met target%	Health of Service Weights	Scores
DELIVERY METRICS	Abandonment Rate	Y	20	CCHD Function Score is 50 Points of Delivery Score
	Average Speed to Answer	P	10	
	First Contact Resolution	N	30	
	Remotely Resolved	Y	40	32.5
	MTRS – Incidents CRITICAL/HIGH	Y	10	MTRS Score is 30 Points of Delivery Score
	MTRS – Incidents MEDIUM	N	20	
	MTRS – Incidents LOW	Y	10	
	MTRS – Service Requests CRITICAL/HIGH	Y	10	
	MTRS – Service Requests MEDIUM	P	20	
	MTRS – Service Requests LOW	Y	30	21.0
	Backlog	Y	20	Aged Tickets is 20 Points of Delivery Score
	30-Day Incident	Y	40	
	30-Day Service Request	Y	40	20.0
			Delivery Score (KPI)	**73.5** Yellow
QUALITY METRICS	CSATs	Y	100	KCS measures are future state
	KCS Usage	Y	0	
	KCS Creations/other		0	
			Quality Score	**100.0** Green

Service

Area	Measure	Metric met target%	Health of Service Weights	Scores
DELIVERY METRICS	Abandonment Rate	N/A		CCHD Function Score is 0 Points of Delivery Score
	Average Speed to Answer	N/A		
	First Contact Resolution	N/A		
	Remotely Resolved	N/A		0.0
	MTRS – Incidents CRITICAL/HIGH	Y	10	MTRS Score is 70 Points of Delivery Score
	MTRS – Incidents MEDIUM	Y	10	
	MTRS – Incidents LOW	Y	30	
	MTRS – Service Requests CRITICAL/HIGH	P	10	
	MTRS – Service Requests MEDIUM	Y	15	
	MTRS – Service Requests LOW	Y	25	66.5
	Backlog	Y	20	Aged Tickets is 30 Points of Delivery Score
	30-Day Incident	Y	40	
	30-Day Service Request	N	40	18.0
			Delivery Score (KPI)	**84.5** Green
QUALITY METRICS	CSATs	N	100	KCS measures are future state
	KCS Usage	N	0	
	KCS Creations/other		0	
			Quality Score	**0.0** Red

Overall Scorecard (with Service Roll-Ups)

		Known/Achievable Quantitative Measures	Manual/Qualitative Measures	Individual Score
Overall Score	**Safety & Security (x%)** CPI	Safety Incidents Security Incidents **Quarterly Device Accountability** x% of Safety & Security score	**Preventative Measures (volume of occurences by quarter)** - assessments - engagement events (discussions in staff meetings, etc.) x% of Safety & Security score **(GPI)**	**80.0** **Green**
	Staffing (x%) CPI	ARC/Backfill **(KPI)** Vacancy Rate **(KPI)** Vacancy Rate IS-2 **(GPI)** x% of Staffing	Sandia Compliance Training (x%) **(GPI)** --- **Staff Engagement - future state?** - new hire training - on and off boarding - skills training/conference attendance - employee satisfaction	**79.0** **Yellow**
	DELIVERY (x%) CPI	Health of the Services (100% of Delivery) **Weighted Distribution** CCHD **(KPI)**, Weight = x UNC Deskside Support (NM) **(KPI)**, Weight = x UNC Deskside Support (CA) **(KPI)**, Weight = x Mobility - Field Support (NM & CA) **(KPI)**, Weight = x Builds Depot **(KPI)**, Weight = x LOFT (NM &CA) **(KPI)**, Weight = x Remote Services (NV & DC) **(GPI)**, Weight = x Classified and Linux Deskside support (NM) Linux/Unix Support		**65.0** **Red**
	QUALITY (x%) CPI	CSATs (x% of Quality) **(KPI)** **Weighted Distribution** CCHD (KPI), Weight = x UNC Deskside Support (NM) (KPI), Weight = x UNC Deskside Support (CA) (KPI), Weight = x Mobility - Field Support (NM & CA) (KPI), Weight = x Builds Depot (KPI), Weight = x LOFT (NM &CA) (KPI), Weight = x Remote Services (NV & DC) (GPI), Weight = x Classified and Linux Deskside support (NM) Linux/Unix Support	Improvements/Preventive Actions - future state - x% of Quality) - Ticket QA audits - Call QA audits - Process/improvement assessments - Problem identification - Implemented improvements or corrective actions **Note:** Sandia is aware that these tasks are regularly completed by the contractor, and wants to ensure the activities are monitored for continual improvement and sustainability. Service Consistancy and Improvement (x% of Quality) **(GPI)** - Knowledge Utilization (KCS) - Other KCS measures? Creation? **- Future State**	**90.0** **Green**
	COST (tracking only)	TBD		

Yellow

Overall Score   **72.4**

No Contract CPI or KPI for this overall score   = (Safety & Security + Staffing + Delivery + Quality)
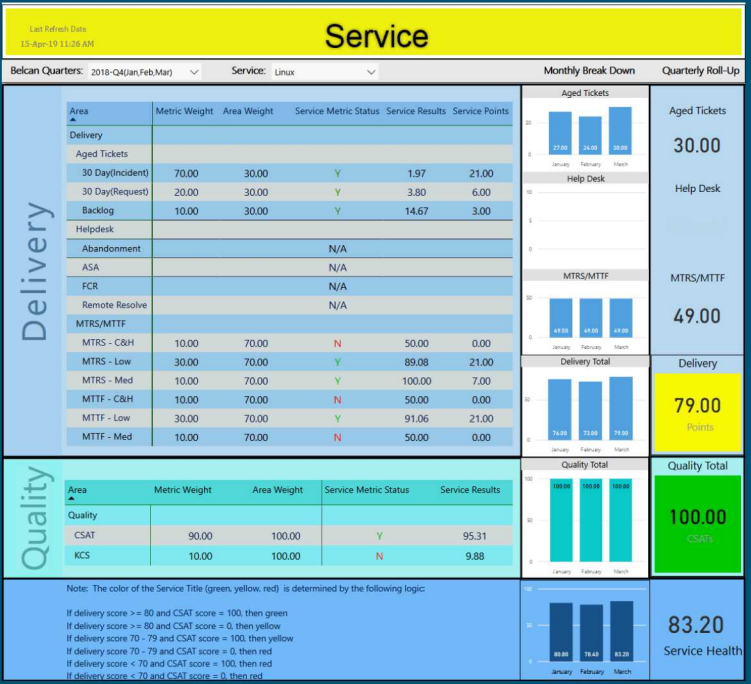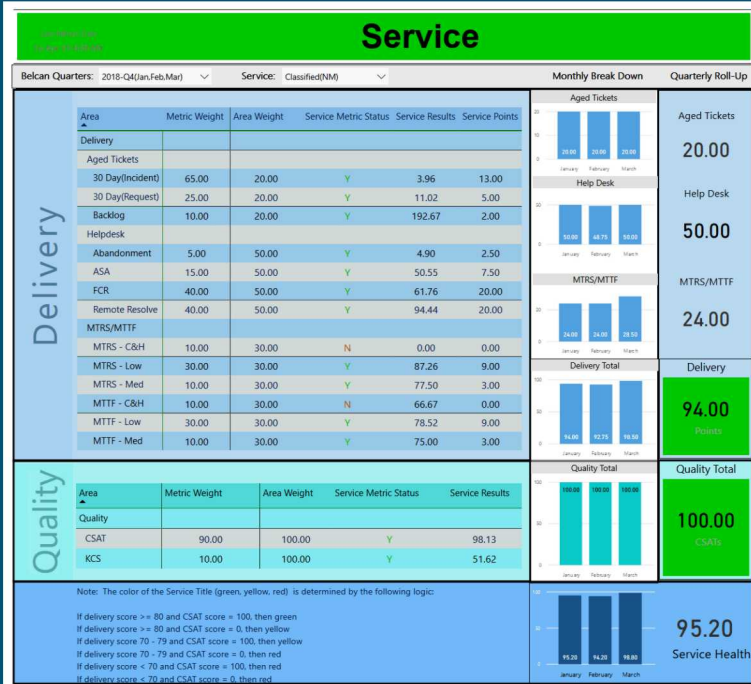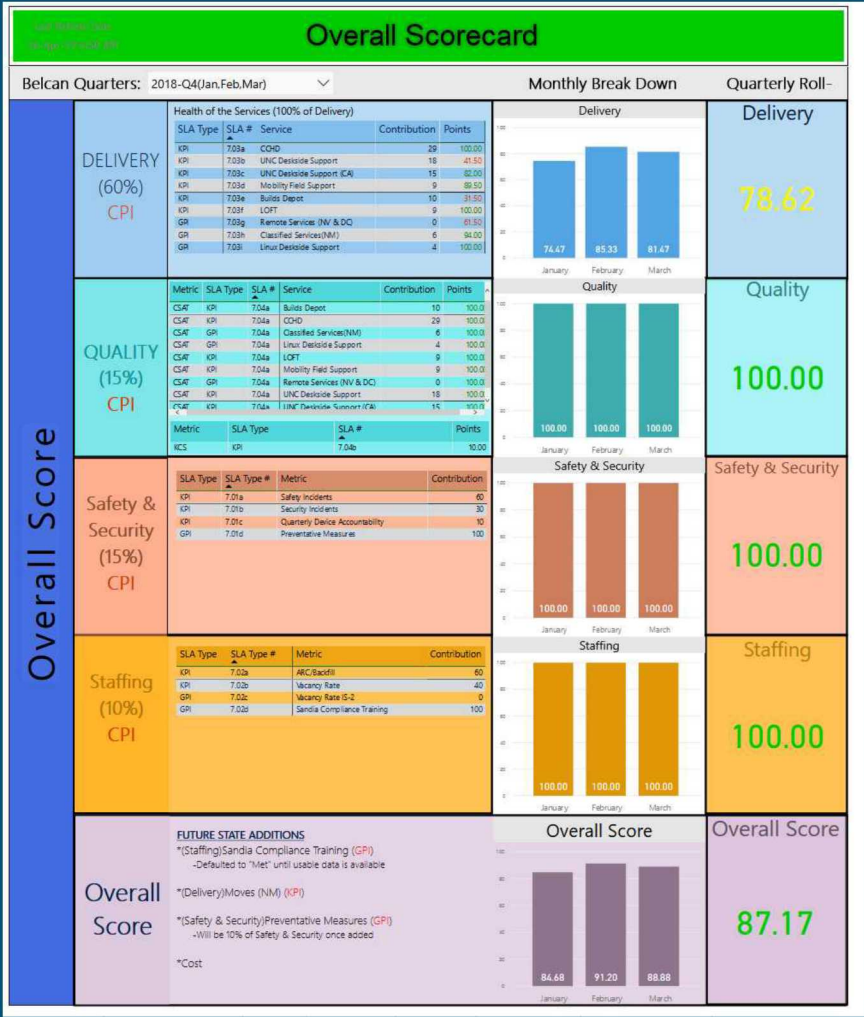
It's not you, Excel, it's us…

… The Move to BI

Conclusion and Lesson's Learned

This has allowed us to really focus in on each service. It also allowed for the subcontractor leadership and Sandia Service Management to speak a common language with a single source of data.

Given the contractual obligations the change had to happen as a big bang, Roll out pieces in an agile way

Ensure for such a huge change all on board for tweaking in early production; don't be afraid of missed metrics and all sides continuing to work together to make it right

Tool changes that introduced Work Orders for Request Fulfillment in middle was a nightmare (impact to this effort was not well defined)

- Underlying reports for Service Request had to all be redone some of these issues are still being worked
- The tool changes occurred at the same time we rolled out the first iteration of the scorecard.

- Belcan Leadership
- Belcan's SQ&I Team
  - Aleka Fahlbush
  - Antwaine Salters
  - Amanda O'Neill
  - Ludie Bitner
  - Michael Telles
  - Nathan Searle

- Sandia Leadership
- SQ&I Service Managers before us
  - Ross Hipple
  - Cynthia Caton

Questions?