Michigan.gov

Building A World Class IT Call Center

Category:	Enterprise IT Management Initiatives
State:	Michigan
Project Start:	2018
Project End:	June 2023
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Helpdesk Optimization for the State of Michigan: The Idea

Executive Summary

Over the past 5 years, the Client Service Center (CSC) has been on a journey to mature into a world class IT Call Center. The CSC business plan initiatives identified operational gaps at the CSC that led to the search and identification of an IT standards certification for our support center. We will explain how we chose to follow the HDI Certified Support Center standard and our internal business plan initiatives to reform our area and to make great strides in operational efficiencies, recognition, employee morale, and retention. In turn, creating positive effects enterprise wide.

The Problem

CSC management realized there were challenges that blocked the center from reaching its full operational potential. Government employees of Michigan did not trust the level of support given by the CSC. This viewpoint was also shared at the executive level of the Department of Technology, Managment & Budget (DTMB). The CSC was perceived as an undesirable place to manage and work. It was viewed as unstable and a problem enabler. Some challenges identified are as follows:

- Lack of industry best practices for operations and metrics
- Not a trusted source of assistance
- High turnover rate
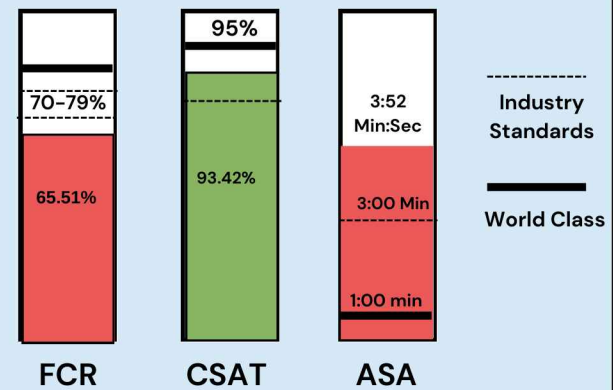- Little to no direction for onboarding, training, and metrics

2015 Metrics Averages:
- **First Call Resolution (FCR) - 65.51%**
- **Customer Satisfaction (CSAT)- 93.42%**
- **Average Speed to Answer (ASA)- 3:52 Min:Sec**

CSC Needs for Success
- **Money, time, and resources**
- **Improved metrics**
- **Improved opinion & trust of CSC**
- **Standards to guide us**

Our role is to assist state employees with their technical issues so they can support the citizens of Michigan. When we found our metrics—specifically First Call Resolution, Customer Satisfaction, and Average Speed to Answer—to be lower than industry standards, we realized we needed to improve them.

"I hate calling the CSC, it takes too long, and my clients are stuck waiting"- Customer feedback, 2015

Why it matters

Our customers (State of Michigan employees) were apprehensive to call us for technical support because it took them away from helping citizens. CSC agents handle 260,000+ calls a year and needed a solution to improve our department's effectiveness and increase customer satisfaction. CSAT is affected by other factors such as FCR and ASA:
- A higher FCR reduces the number of calls and time a customer spends to resolve an IT issue.
- A lower ASA equals less time a customer spends waiting to talk to an agent.

Focusing on these changes helped us identify more areas within the CSC needing improvement, especially the quality, quantity, and timeliness of our work. Another very significant reason we needed to improve our business process was to attract and retain quality employees.

How it is different

As of 2019, there were no specific industry standards for state government agency IT call centers. This initiative made setting the standard and becoming **the first and only State Government Agency to become HDI Support Center Certified** groundbreaking. When starting the project, we knew there were specific standards impossible for us to reach (such as supply and vendor management) since we are not in the private sector and have limited resources.

How it is universal

The use of HDI initiatives are universal as a guideline that all IT call centers can use as a framework, as long as they are willing to invest time and energy into achieving it. We went back to the basics of successful IT call centers by focusing on **people, processes, and technology.**

Helpdesk Optimization for the State of Michigan: The Implementation

Road Map

Repeat in a Continual Improvement Model to increase maturity

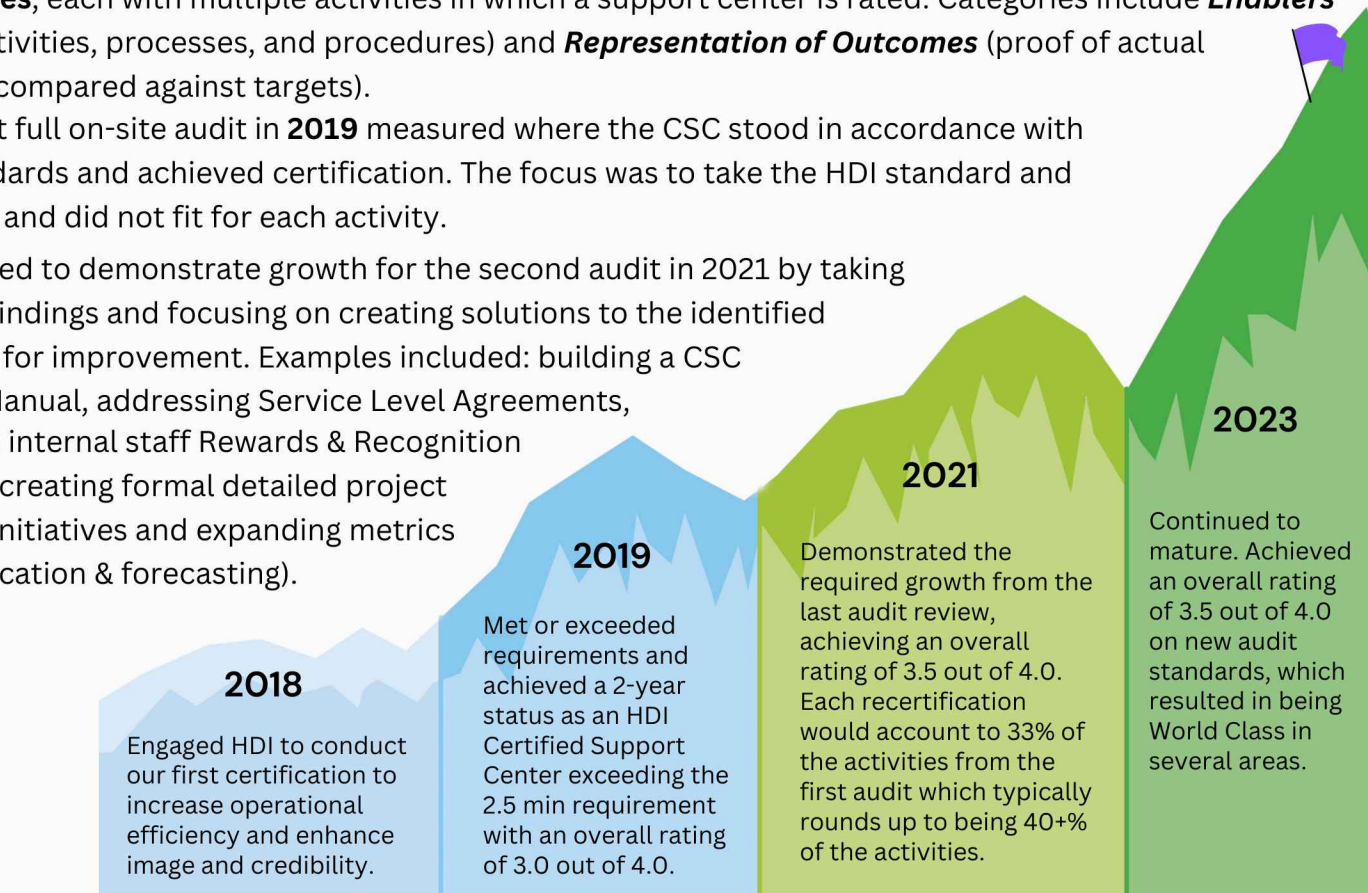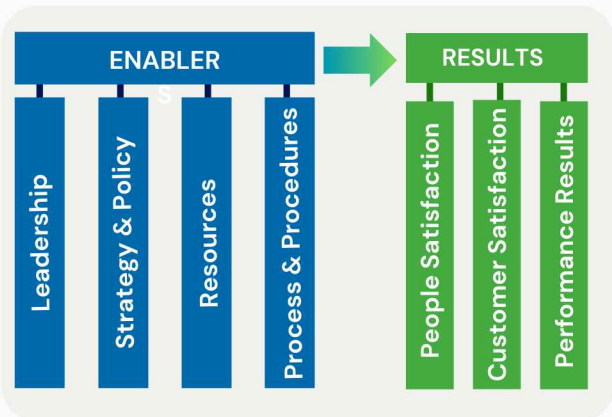| Plan: Meet with experts (HDI, TEKsysytems) | → | Analyze: Audit where we are | Design: Create initiatives that align with DTMB strategy | Implementation: Stakeholders carry out initiatives | Test: metrics and surveys to show results |

Project Management

The HDI Support Center Certification program, an internationally recognized standard for best practices in IT support, was a perfect fit to improve the CSC's problems. The HDI Support Center standard is organized into **eight categories**, each with multiple activities in which a support center is rated. Categories include *Enablers of Quality* (activities, processes, and procedures) and *Representation of Outcomes* (proof of actual performance compared against targets).

The CSC's first full on-site audit in **2019** measured where the CSC stood in accordance with industry standards and achieved certification. The focus was to take the HDI standard and apply what fit and did not fit for each activity.

The CSC needed to demonstrate growth for the second audit in 2021 by taking the previous findings and focusing on creating solutions to the identified opportunities for improvement. Examples included: building a CSC Operational Manual, addressing Service Level Agreements, developing an internal staff Rewards & Recognition program, and creating formal detailed project plans for our initiatives and expanding metrics (targets justification & forecasting).

2018

Engaged HDI to conduct our first certification to increase operational efficiency and enhance image and credibility.

2019

Met or exceeded requirements and achieved a 2-year status as an HDI Certified Support Center exceeding the 2.5 min requirement with an overall rating of 3.0 out of 4.0.

2021

Demonstrated the required growth from the last audit review, achieving an overall rating of 3.5 out of 4.0. Each recertification would account to 33% of the activities from the first audit which typically rounds up to being 40+% of the activities.

2023

Continued to mature. Achieved an overall rating of 3.5 out of 4.0 on new audit standards, which resulted in being World Class in several areas.

Six months prior to the CSC's scheduled **2023** recertification audit, HDI introduced updated certifications standards. Given the option to move forward with the new comprehensive standards, the CSC took the challenge to test our center's maturity. Updates mainly focused on the actions taken with key performance analytics collected and pursued opportunities to improve operational efficiency by focusing on **Enablers and Results** (pictured left). The CSC was only the second entity to adopt the new standard, according to our HDI auditor.

Involvement

The project management team consisted of in-house staff. The majority was from our Quality Assurance Team and the Management Team. DTMB Executive Management support and agent support was crucial to make this initiative possible. The project would not have been possible without the buy-in of all stakeholders, especially the core team spending several hours a week to organize and ensure all tasks were completed.

Executive Leadership
Analyzed data and directed a culture change through positive effects of engagement while aligning with departmental strategic goals

Quality Assurance Team
Oversaw entire project assuring Onboarding, Training, Quality Assurance, Knowledge Articles, and Metrics met the standards

Vendor
Delivery Manager for process improvements and operations manual

Call Center Agents
Actively learned and participated in the change by providing feedback and recommendations

Change Specialist
Change management, root cause analysis, Disaster recovery, and Documentation

Project Managment Stakeholders

Helpdesk Optimization for the State of Michigan: The Impact

Making the CSC Better

These improvements enabled the call center to better support the 50K+ state employees that serve the citizens of Michigan and become the first and only state agency in the United States that is a HDI Certified Support Center. Our 140 employees, who serve as the primary point contact to the State of Michigan employees and contractors when they experience issues with computers and technology, are now trusted and praised for their great work. Our metrics and customer surveys are higher than they have ever been. This project resulted in an efficient and customer-driven IT call center and ensured that all of our enterprise support met our customers' expectations.
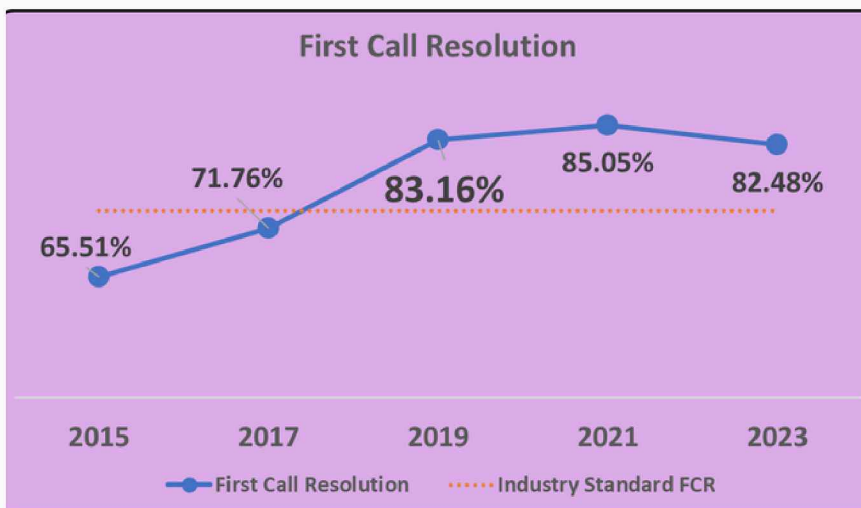
Benefits for the CSC

The CSC has flourished due to countless hours of hard work and dedication demonstrated by our employees. The methods and lessons learned through this project have spread to other CSC initiatives. Beyond becoming the first State HDI Certified Support Center, we also received two recertifications and are preparing for our third May 2025. After this culture change, staff and customers surveyed are happier overall.

CSC Before 2018

- Documentation – Lack of formal organization
- Quality statistics were not being used to full potential
  - Metrics – minimal scorecards
  - Training – formal training program was not defined
  - Quality Assurance – less utilization tools
  - Communications – limited forms of communication
- Lack of collaborative work with other areas
- Staff turnover rate was not measured or analyzed
  - There was minimal movement throughout other areas

CSC After 2023

- Centralized documentation with processes and procedures in place for auditing
- Quality statistics were brought into strategic initiatives for process improvements
  - Metrics – maximized use of metrics to meet and exceed standards
  - Training – standardized training program with multiple training options
  - Quality Assurance – increased customer experience and documentation assessments resulting in outstanding call quality and customer service
  - Communication – transparency to our internal and external stakeholders through various forms of communication
- Increased collaborative work with Agency Services, Chief Technology Office and other IT pillars within DTMB
- Positive attrition is now measured through career path initiative and CSC staff development opportunities
- Became a great steppingstone for those seeking jobs within the IT field
- A complete culture shift and elevated morale
- "A World Class IT Call Center" exceeding industry standards

First Call Resolution

65.51% (2015)
71.76% (2017)
83.16% (2019)
85.05% (2021)
82.48% (2023)

— First Call Resolution ······· Industry Standard FCR

"Excellent customer service provided. I had multiple issues, and all were resolved in a customer service centric approach. Top notch representative, very professional."
–Customer Feedback

The greatest way to see our success story is through our continuously improving metrics. Our FCR is an area we take great pride in our improvement from where we started in 2015 to where we were when 2023 ended. It is important to note that we were only resolving 65.51% of tickets created in 2015 during our first contact with clients. After completing two different Lean Process Improvement (LPI) initiatives, we were able to shift particular work to the CSC from other areas of DTMB. We also looked at our own operations and shifted work to better assist our customers. These two major changes resulted in the CSC being able to assist the users on their first call, driving an increase of our FCR to a world class level of 82.48%.

In 2015, the CSC's CSAT score started at a relatively/fairly/somewhat high score of 93.42%—this was our starting point and a high bar to maintain. As highlighted in the chart, and as a result of incremental process improvements our vendor recommended and helped to implement, CSAT improved to 95.12% in 2017. After our first HDI audit in 2019, we achieved a score of 96.80%. After the 2019 audit, the score leveled out and then improved to 97.47% after we finished the 3rd audit in 2023.

Customer Satisfaction

93.42% (2015) — 95.12% (2017) — 96.80% (2019) — 96.72% (2021) — 97.47% (2023)

"Great communication, knowledge, and skills. Super! Wonderful. Nice and professional."
"Very wonderful and quick response. Great representative. Very polite and helpful to talk with."
– Customer Feedback

Avg Speed to Answer

3:52 (2015) — 1:01 (2017) — 2:20 (2019) — 8:38 (2021) — 2:05 (2023)

Average Speed to Answer has been a number that is hard to judge over the years. We have to look at all other metrics in order to get a clear understanding of the average answer speed. As represented in the chart, in 2015 our ASA was under 4 minutes. In 2017, we greatly improved our ASA averaging at 1:01 (min/sec), however, we were not resolving many tickets at the CSC. More were being passed to other teams for resolution. Beginning in 2020, ASA began to rise and landed at 8:38 (min/sec) in 2021 due to Covid-19 and shifting from remote to hybrid work. In 2023, we rounded out the year by decreasing our ASA to 2:05 (min/sec), an achievement the CSC is proud of.

Feedback

Since the CSC's improvement journey began, we focused on improving other state agencies' perception of us and increasing our customer satisfaction. In 2023, our HDI auditor, DTMB Executives, Agency partners, and other customers had great things to say about our call center. Feedback shows we are accomplishing our goals. We are now a trusted support desk that State of Michigan employees with technical issues call without hesitation. We take great pride in the feedback given to us and used it to measure how far we have come in the past five years.

Several Agency executives have commented in 2023: *"We no longer hesitate to call the CSC and when calling, we get excellent service."*
- Executives

"By becoming HDI Certified in 2019 and retaining certification through audits in 2021 and 2023, the DTMB Client Service Center has proven its commitment to the State of Michigan and its customers."
– HDI auditor

Continual Improvement Opportunities

→ Operations Plans – making training guides a manual for managers and supervisors

→ Incident Management – looking to see how they can play a more active role in managing incidents

→ Succession Plans – tracking staff interest in particular roles

→ Support Center Services Continuity Management – continuing initiatives encompassing disaster recovery and business continuity plans

While looking for ways to help the Call Center as a whole, we also hope to help individuals within the CSC improve, increasing opportunities for staff to improve in their technical skills, management skills and above all, their customer service skills. We are focusing on individualized trainings for our staff that align with industry standards and best practices such as:

ITIL Training → HDI Training → Professional organizational conferences → Knowledge Centered Solutions Training →

The Future of the Client Service Center

Since becoming the first and only HDI Certified Support center in the State of Michigan, we have begun working on a project called Call Center Best Practices. Moving forward, one of the main goals for the CSC is to share the knowledge gained through this project with other call centers within the State of Michigan and we now possess the knowledge and tools to proceed.

An overview of what we hope to accomplish looks like this:

☑ Plan to visit other call centers in the State of Michigan and share with them what we learned.

☑ There are 100+ call centers in the State of Michigan, many of which are still using older technologies and methods. We hope to inspire them to improve their call centers by going back to the basics of people, processes and technology to operate more efficiently.

☑ We hope to collaborate and share the best practices we learned to help them become more successful and meet industry standards.

☑ This project will also help us to maintain our high standards by finding other ways we can improve.

☑ The project will improve workers and citizens ability to find information and assistance.

☑ Our goal is to cultivate operational synergy with the other State of Michigan call centers.

The CSC's plan is to maintain and exceed industry standards going forward. We want to see continuous improvement in our operations. This process will help us grow and create more standardized practices. This will be achieved through **questioning and testing the "why."** We plan to utilize HDI for future audits to measure our progress. The focus begins with looking for additional opportunities to increase customer feedback through surveys and outreach. This journey has helped the CSC to become a World Class IT Call Center and we look forward to helping others, enterprise wide, achieve the same level of operational success.