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Improving the Service Desk

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When it comes to call centers and service desks in general, there are specific goals the company has. Keep the customer happy by meeting your service level agreements, equip your teams with the knowledge and information to strive, and be efficient to save money. For my capstone I chose to focus where I spend most of my time which is at work 40 or more hours a week. I work as a tier two remote desktop management agent for the Navy, which can come with responsibility. We rely on our first tier to troubleshoot and document everything they've attempted with my tier's required information to help a customer with advanced issues further. Lately, with the mass hiring of new agents, tickets' quality escalated from mediocre to just plain wrong. They are missing important information on what is not working to not even getting a callback number to call the customer later. We all know as customers in this age that customers are how the company gets paid so if the customers unhappy then things can get bad. The goal of my project was to evaluate these new hires coming in with the training and guidance they receive, find where we are falling short of bringing successful techs into production, and provide my suggestions to the trainers, leads, and my service desk supervisor.

As a preface to why I believe I can help this project, I've been working this service desk with my company for almost four years and have been a part of the tier two team for nearly two years. I have always told my supervisors and the leads of whatever team I was on that anything there was to learn, I wanted to learn it. I wanted to be the all-around utility guy who could help fix many issues because that is who I am. Over the summer, my team was getting a break from constant escalations. This gave us free time to take on projects trying to get some of our tier one agents into better shape with their calls and overall ticket creation. We treated it as mentoring to all the tier ones. Our goal was not to tear down but to build and improve the skills of agents we would get to talk with. This project gave me face-to-face conversations with these tier one agents to understand their process. I would get to review these agents' previous escalations over the past month and listen to their previous calls over the last few days. After that, I would take note of things I heard that could be changed and provide specific documentation we already had on how to fix issues they might have missed. After talking to my agents, I would ask if they had any questions that they could come to my desk or email me, and I would be happy to answer. The issue here is that this was mainly done with agents who have been on the desk for a while.

To start this project, I needed to evaluate where I would begin. Recent new hires were then culprits escalating new tickets that upset the entire team. But I can't immediately blame them, and I don't. You're never expected to be perfect right as you start. Mainly because when I started on the service desk back in 2017, there was no training like this. I was hired and then immediately listened to calls with other agents for two or three weeks, then it was my turn to start taking calls. So, I needed to evaluate their training material, go through what has been shown to them as the 'correct process,' and make sure that it is solid. Because the Navy is so big, we are not the only location with recent new hires, but I can only help those at my current desk for now, but I'd like to get the ball rolling for the other locations after this. The first goal with the training is to just talk with the trainer himself, which ended up being someone I initially trained a few years ago. So he knew I was there purely in the interest of helping the service desk get better for the sake of the company and the customers. I love the fact we've upgraded to instructors teaching as it shows better dedication to our customers, "This can be a highly effective method of employee training, especially for complex topics. Instructors can answer specific employee questions or direct them to further resources." (Bleich, 2017). To help me understand, it was explained to me that our new agents currently go through about eight weeks of training total. Four weeks are spent in the classroom where they will go over the employee handbook, how to use our ticketing system, where to input specific information, where to find documentation on how to resolve specific issues, as well as listen to calls on how to answer the phone using the call script before troubleshooting properly. The next four weeks are meant to be spent in our on-the-job training part of the service desk. These new agents will listen to calls for the first two weeks, followed by taking calls of their own with two leads designated explicitly to the team to assist with issues if needed.

My focus was on their first four weeks of training with that information. I know I could leave specific company training alone as that is not what my focus was on. There are eight training modules related to our service desk work covered in the four weeks, which in my reviewing felt like it could be information overload. Another trend I noticed in the majority of the slides was that while they talked about common problems, the trainers were missing the document IDs for these new agents to write down and use later for reference when on their own. This is a common issue even with agents who have been on the service desk now. No one knows where to find specific troubleshooting because they don't know what document would specifically help with a particular issue. Given that it is never helpful to only point out this issue, I provided a document of my suggestions for what slides need fixing as well as provided every document ID number for the specific slides I think they belong to, and why I think they should emphasize the use of the said document.

With the on-the-job training, I found it to be a bit trickier to tackle. This has not been a training process in close to 10 years, so it is underdeveloped. Personally, when I have taken escalations from those in this training, they still do not have a grip on their tools. They cannot explain certain procedures to customers correctly, and surprisingly their two leads are unavailable to assist. There has also been an issue with them essentially unteaching specific steps that the new agents were instructed to use in the classroom. But regardless, I still had plenty to dig and see how these agents were doing. As I mentioned previously, during my mentoring process months before this project, I was given access to review calls and tickets for tier one agents and got to keep. With these tools and a list of names, I took my time and reviewed each agent carefully to experience their call. I would note how long it took, whether they followed the introductions script, gathered good contact information, and filled out their tickets correctly. I am glad that most of these new agents did not seem to struggle with handling their customers. When initially put into on-the-job training, these agents do not have all the normal permissions of a typical tier one right away. They have to do everything so that they can talk the customer through the steps because they cannot remote into the machine and see the issue for themselves. This is where it is so important how you talk to the customer, and *Zendesk* states perfectly the expectation of when to *Listen, summarize, and repeat*. "Listening closely to a customer's problem is an important customer service skill because it enables agents to summarize and repeat the customer's problem. Doing so ensures that the customer feels their issue is understood. On top of summarizing and repeating the customer's issue, it's also important to summarize the help you're providing. The ability to adequately communicate all that you're doing to help is a top job skill for customer service employees because then customers are informed and clear on the next steps that will help solve their issue." (Zendesk, 2019)

Now that I know these agents seem to handle the customers well enough to manage independently, this is half the job. The other half that is just as important is creating tickets for each interaction no matter how big or small. My investigation made us realize why there are so many issues. While solid on the phones, these new agents were doing abysmal when creating tickets and did not seem to understand why tickets needed to be rock solid with information. Due to our contract, each ticket can be considered a legally binding document stating what an agent did during their call and can be used in court if for some reason ever needed. When I started to match up phone calls with agents' tickets they had submitted to the system, quite a few tickets were not even created even though they were spending almost 20 minutes on these calls. I know exactly the reason because when I was a tier one, I did the same thing for a short while, and it's the expectation that each time an agent hangs up with a customer, they are expected to be done and right back into the queue. All notes and everything is to be submitted, but that does not always happen and if an agent does not enter back onto the queue soon enough technically negatively counts against their stats, eventually leading to 'coaching'.

This is where I bring my expertise after examining the training, call stats, and ticket documentation. These agents struggle with finding their resolutions because they cannot find documentation on how to resolve issues. They follow up with escalating tickets to the next tier, either my team or a local office, which can result in an even longer wait for what could have been fixed on the phone. My overall suggested change is that these agents need more classroom coaching. I re-teamed up with the trainer, and with my provided notes, we sat down to make some changes that still follow the process and expectations of the contract. Me and the trainer also now make very clear to new agents that required checklists must be filled out completely to escalate to tier two or the local field services offices. With these agents barely brought into production, I sent them the most common issues they will see with the list of our knowledge documents on how to resolve them.

With these suggested changes, I brought them to my team lead, who reviews our tickets if we have to escalate advanced issues to be investigated further, which is not uncommon but does not happen unless every step has been exhausted to prove a reason for investigating. After I proposed my changes to my lead, he agreed that we needed the changes as soon as possible and not just at our location, all of them. Recently I got to have a one-on-one conversation with my supervisor and discuss these changes and how we can keep these results. There has always been the hint of a quality assurance team, but the issue is it's one person, and they are not tasked with reviewing agents and their calls or tickets. The other problem we both see is that there is no significant feedback given to agents after a call, so we need to establish a better process of keeping the agents on the same field. "The QA process identifies flaws in your service. Call monitoring is a core aspect, enabling analysts and managers to listen in on interactions and pinpoint areas demanding improvement." (Playvox, 2021) My supervisor and I both discussed the longevity of the service desk and how we want to move forward increasing our consistency with agents and that after these initial training changes introducing a larger QA team meant to analyze these tickets and calls can be our big push for change.

The results of my project have made more significant changes than I could have ever hoped to happen, given that any changes made have to be reviewed by multiple teams and be justified if they require putting more money out to start something. My overall suggested changes have been added to the trainers' slides and are now more specific for our agents to be better prepared. As well as classroom time will potentially be getting extended into six weeks of training later to allow more time for agents to listen to calls in the classroom and learn the best practices or troubleshooting and what documents helped resolve the issues. The agents I reviewed and provided my notes to have gotten more consistent on notating their troubleshooting steps and, even better, putting the actual errors in the tickets. Our location is becoming the most consistent at troubleshooting and resolving customers issues where some customers only trust our agents to resolve their issues. This also helps get our training passed along to the other locations as the expected process and results when new agents are hired and put through training for the service desk.

With my project complete, I was able to help all my stakeholders involved and focus on improvement for not just a few but all involved in the service desk. My team benefits from better-documented tickets giving us the ability to resolve escalations quickly. The customers now have more confidence that calling in will get someone knowledgeable and ready to help. Tier one agents have now been given the expected process to eliminate confusion and better knowledge on finding documentation to resolve the majority of their calls quicker. Lastly, the company itself directly benefits from these changes, so meeting the service level agreement of the contract becomes less challenging. With these changes, the service desk will see a dramatic shift in stats to make upper leadership happy.

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