



Help Desk **Simplified**

Help Desk Software Metrics

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The importance of meaningful metrics in help desk software cannot be underestimated. Help Desk teams need to be able to proactively, and retroactively, monitor their own performance. Being able to execute reports, export data and display graphical cues is a vital part of the ongoing feedback loop that ensures help desk teams continually refine and improve their performance.



In ITIL, a metric is defined as ‘something that is measured and reported to help manage a Process, IT Service or Activity’. Metrics are therefore a crucial part of any help desk software package which assists a team in delivering IT services within the ITIL framework.

Monitoring KPIs in Help Desk Software

Key Performance Indicators are crucial if a help desk is to meet its operational targets. Help Desk software is an essential part of the KPI tracking and monitoring process. Agreed KPIs should be entered into help desk software to allow the team, department or organization track progress and ensure the help desk is meeting agreed targets for problem resolution, ticket management and compliance.

The results of these measurements can also be fed back into the help desk team’s processes and workflows to ensure continual improvement. Over time, managers will be able to see where KPIs can be refined and improved, either in line with the ITIL lifecycle or according to internal business requirements.

Working with Views in Help Desk Software

Within help desk software, data is often displayed in views. Views are customizable selections of data which can be adapted to fit the needs of the help desk team or organization. Allowing team members to change views ensures all data required by a particular individual can be displayed on screen. Applying different saved views to the same aggregate data effectively helps the user to produce their own quick reports.

Customizable Reports

If more in-depth reports are required, care should be taken to avoid choosing a ‘one-size-fits-all’ reporting solution. Reports generated from help desk software should be customizable, but a collection of pre-set reports for common scenarios should be included to help the help desk team get started with reporting out of the box.

Once custom reports are tweaked and refined, they should be saved within the administration area of the help desk software application for easy retrieval. The ability to clone reports is a useful way to duplicate and manipulate a report without modifying the original, giving administrators very fine control over the criteria, outputs and layout. Tweaking and changing reports is the best way to ensure the data in each report is relevant, targeted and displayed in the correct format.

Customizable Data Export from Help Desk Software

At some stage in the help desk lifecycle, it becomes necessary to export reports for senior management, or to monitor team performance. Different reports need to be reported and analyzed in different ways, so an array of export options will help to streamline the process. A service delivery manager may prefer to receive a PDF breakdown with RAG charts and figures presented in graphical formats. Equally, teams working with figures may prefer to receive the same data as an Excel spreadsheet or Word document. Having a wide range of export options ensures the same data can easily be examined by different teams, all using the same source.

Should the export options not be sufficient, some help desk software packages allow direct connection to the back-end database in order to extract data with custom commands. For example, a web application may require figures to be extracted from MySQL using PHP. If this kind of data visualisation is necessary, ask your help desk software provider whether the database they provide is encrypted. An encrypted database can present a challenge if data needs to be manipulated and downloaded directly from the back-end database.

Scheduling of Reports

Often, key staff will ask the help desk team to produce reports on a regular basis. These reports can help senior management to quickly assess the help desk's position in terms of its SLAs, OLAs and KPIs, and they can ensure the help desk team are adhering to the ITIL framework in the processing of incidents, requests, problems and changes.

Rather than assigning one or two staff resources to producing reports, it's far more suitable for the help desk software to be able to produce them automatically. The most common way to achieve this is to apply an existing report and ensure that report is automatically emailed at a designated time: weekly, fortnightly, monthly etc. In addition, some help desk software packages allow a view (as discussed above) to be applied to a report, increasing the number of ways the same data can be displayed. Automatic and scheduled reporting is a crucial part of help desk efficiency, and in practice, it frees up first line staff to deal with incoming enquiries.

Metrics in Change and Release Management

Using metrics is a good way to ensure planned Changes and Releases are executed in an efficient, timely manner.

By gathering metrics about the Change Management process, from Change Proposal and Change Assessment through to Planned Release and ongoing service delivery. Measuring the productivity of the Change Advisory Board is a good starting point when using help desk software to track the success of Changes. For day-to-day use, it's also useful to provide the CAB with metrics around the progress of Changes, the number of outstanding Changes and the expected (or average) implementation time for a Change.

In terms of Releases, the team should be able to track their successes, failures and turnaround time for each Release. In addition, reports should show the number of Incidents and Problems relating to a particular release so that data useful in future Changes can be quickly identified.

These metrics help the Change Manager and Release Manager to adhere to their responsibilities under ITIL, and also have a secondary purpose of keeping users informed of progress, both inside and outside the scope of service management.

The Importance of the Help Desk Dashboard

When discussing metrics, it's vital to also mention overviews and dashboards. Where reports provide a retrospective view, the Dashboard area provides an at-a-glance view of the status of the help desk at that very moment.

Displaying data visually helps each team member to monitor the status of tickets within their help desk software and respond quickly to any urgent issues. It's also important to ensure the overview is in the form of a customizable dashboard view. With customization, each subsection within the help desk team or department can adapt the information through panels or widgets, position those widgets on screen and monitor only the information that's relevant to them. For example, a help desk administrator may wish monitor first line tasks only, whereas a team leader could opt to see tickets approaching their due date across first, second and third line staff.

The dashboard is also a useful place for important announcements. Rather than generating additional email traffic, posting help desk announcements within the dashboard view ensures all technical users have instant access to updates about issues which may affect them. This allows the help desk team to communicate efficiently within their own team. Good help desk software applications will also give administrators the option to post these updates on a customer portal or other visible location, ensuring a unified approach to system updates and news.

Help Desk Software Metrics Conclusion

Being able to quickly and effectively retrieve valuable metrics is a critical component to any help desk software application. Without it, your help desk software can quickly become a list manager or task manager. The more ways you have to pull the data and the metrics that you want and see them in a meaningful way, the more valuable your help desk software becomes. That's why with [Help Desk Premier](#) we give you countless options to retrieve the metrics that matter to you most.