National Aeronautics and Space Administration

NASA Shared Services Center

NSSC ServiceNow – Enterprise Service Center

2.17 Metrics and Utilization

Customer Contact Center

Document Version	V.2
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Reference: Contract Attachment I-26 Business Rules

NASA Shared Services Center
Building 1111, Jerry Hlass Road
Stennis Space Center, MS 39529

OVERVIEW:

Brief Description:

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

Metrics
Utilization
Performance Analytics

Note: See Appendix A – Work Instructions

If applicable:

If this is being updated as the result of a Change, please provide the following information:

Effective Date of Change: December 2019

Description of Change: Survey questions moved from two (2) with additional three (3) optional to five (5) questions.

Contract Modification: ?

Impact to existing Metrics/Utilization/Transactions: Metric

REPORTING SUMMARY :

Suggested Report Title for Metric and Utilization:	I.3_FA_PWS Element Metric: 2.17 Customer Satisfaction
Global Setting: Y/N	Yes
Functional Area:	Enterprise Service Center
PWS Section:	2.17
Performance Area:	ESC
SO/SME	
TYPE: SLI/PM/OTHER	SLI
Dependencies or impacts on other Areas/ Functional Areas:	N/A
I-3 Reportable	Yes
Contract Modification	No
SN Story Number/Date Submitted	STRY0622674 / 2020-05-11
SN PA Story/Date Submitted	STRY0622674 / 2020-06-17
Approval – CS/SP	
Metrics Team Review	
Metric I-3	90% Customer Satisfaction Rating
Tech Doc Location/Date Archived	

ServiceNow Data – Metric Definition Template
Metrics and Utilization

Metric Definition Template

Definition Name = CCC Customer Satisfaction

Description on metric definition:

1. APPLIES TO:
   a. Call tickets with "Phone" contact type is resolved at CCC and customer offered survey.
   b. Category: All
2. CALENDAR USED: NSSC Metric Days (excludes weekends, federal holidays and NSSC down days)
3. TRIGGER/START CONDITION: Metric record should be created when Call tickets with "Phone" contact type is resolved at CCC and customer offered survey.
4. PAUSE CRITERIA: None
5. EXCLUSION CRITERIA: Contact type other than Phone, Call ticket not resolved at CCC, Survey not offered.
6. MET CONDITION: 90% Customer Satisfaction Rating
7. FILTER CONDITION: Monthly or Weekly
8. Additional Criteria:
   - Pull data from SN Report: Survey Call data - VLM
   - Filter data - Contact Type = Phone
   - Filter data - Call State = Resolved (some surveys will not be counted)
   - Add "Survey_Script" to CV7 on all records that have a blank CV1 but responses in the other custom variables. Check all the CV's (this tags all the records where the customer skips CV1 but answers any of the other CVs)
   - Also check for records that have values in CV1 - CV5 but does not have "Survey_Script" in CV7. If so, add "Survey_Script" to CV7.
   - Final step Filter by CV7 = Survey_Script. This is the Population.wasDevelop an NSSC Survey Dashboard Functional Prototype to display satisfaction and repose rates for the phone survey results. (Reference the attached list of current reports.)
   - Callbacks are excluded from calculation.
   - ESD Queue = False

Field Values:

Session ID: Unique call transaction identifier

Application Name: Identifies NSSCCCX as the application where the transaction originated.

Customer Service Queue: The queue the call came into.

ESD queue: true or false identifier
Call state: The call ticket state
Disposition: Identifies if a call was Handled or Abandoned
Start date time: The date/time the phone call was offered to a service queue.
End date time The date/time the phone call was ended.
Total time: The time from when the call entered the queue till the time the call state finished after call work.
Customer Variable 1: Survey question 1 response
Customer Variable 2: Survey question 2 response
Customer Variable 3: Survey question 3 response
Customer Variable 4: Survey question 4 response
Customer Variable 5: Survey question 5 response
Customer Variable 6: The phone number the call came in from.
Customer Variable 7: Identifies that a survey was taken.
Customer Variable 8: The last Customer service queue.
Customer Variable 9: The phone number the call came in from.
End date: Date the call ended.
Met service level: Was service level met.
Transfer: Call transferred out of the customer service queue to another queue (includes into survey).
Redirect: Indicates call being deferred from agent.
Created: The date/time the call ticket was created.
Contact type: Identifies Call ticket source.

ACCEPTANCE CRITERIA:

Example of Metric Definition:METRICS AND UTILIZATION

HR - Classification - Classifications completed on time (I-3 - 3.2.15)

Definition Name = HR - Classification Completed on Time

Description on metric definition:

1. APPLIES TO:
   a. HR Cases
   b. Category CLASSIFICATION
   c. Subcategory of NEW PD
2. CALENDAR USED: NSSC Metric Days (excludes weekends, federal holidays and NSSC down days)
3. TRIGGER/START CONDITION: Metric record should be created when the date field "Classification Completed" is populated on the FD "New PD" tab
4. PAUSE CRITERIA: NONE
5. EXCLUSION CRITERIA:
   a. If no Functional Detail exists, it is excluded from the report.
   b. If the Case is status is Closed Incomplete, it is excluded from the report.
6. MET CONDITION: less than 31 business days between Case Opened and "Classification Completed" date
7. FILTER CONDITION: This report should have a filter condition that default to metric date during ("on") the last month; users should be able to change the report to use a "between" date range.
8. Additional Criteria:
   a. Metric Date will be set to the "Classification Completed" date
   b. One metric record per Case.
   c. Metric value should be set to 1
   d. Re-fire metric if subcategory or "Classification Completed" date field change value

Field Values:

Sub Doc: FD record this metric was calculated against

Calculated Age: WIP time in days based on schedule

Start: Date case was opened

End: Date in 'Classification Completed' field on the FD

Metric Date: Date in 'Classification Completed' field on the FD

Metric Start: Date case was opened

Pending Duration: Pending time of case

Business Duration: Total time case was active

Duration: Full time of metric calculation, not counting schedule

Additional Scripts:

Business rule on u_hr_case with same title as this metric that will mark metrics excluded if case is closed incomplete. (Also handled by Exclude Metric on HR Case Incomplete)

REPORT REQUIREMENTS: METRICS AND UTILIZATION

Name of Report	
Report Content	By quarter count and satisfaction rate, Overall satisfaction rate, totals by month, population by quarter, survey population (respondents / non-respondents), satisfaction rate trend, responses by service queue, survey by question effectiveness.
Input Parameters	Call table Call & CXX data Filtering Conditions Need to be able to filter Monthly or Weekly STEPS: 1. Pull data from SN Report: Survey Call data - VLM 2. Filter data - Contact Type = Phone 3. Filter data - Call State = Resolved (some surveys will not be counted) 4. Add "Survey_Script" to CV7 on all records that have a blank CV1 but responses in the other custom variables. Check all the CV's (this tags all the records where the customer skips CV1 but answers any of the other CVs) 5. Also check for records that have values in CV1 - CV5 but does not have "Survey_Script" in CV7. If so, add "Survey_Script" to CV7. 6. Final step Filter by CV7 = Survey_Script. This is the Population.wasDevelop an NSSC Survey Dashboard Functional Prototype to display satisfaction and repose rates for the phone survey results. (Reference the attached list of current reports.) 7. Callbacks are excluded from calculation.
Output Parameters	Name of Dashboard: NSSC Surveys Tab Name: Phone Surveys

ServiceNow Data – Metric Definition Template Performance Analytics

Story Dependency: STRY0622674
Name of Report: TBD

Placement / Location: on the Internal and External dashboards

Internal
Dashboard Name:
Dashboard Group:
Dashboard Tab:

External2
Dashboard Name:
Dashboard Group:
Dashboard Tab:
Data Source Table

Name of Analytic on Internal Dashboard:
Name of Analytic on External Dashboard:

Dates to show trend: Created on Last Month

Frequency: Monthly

SLI Formula:
Met:
Not/Met:

Conditions:
Definition Name

SLI or PM Percentage Calculation:
If the metric calculation is => xx%, the SLI or PMis met
If the metric calculation is < xx%, the SLI or PMis not met
Stoplight is displayed at the top of the top of the Analytic

Type of Visualization:
Bar Graph – Displays Count for the Month
Y-axis should show the percentage on the left and the counts on the right
Breakdown: Center & Met/Not Met
Add a threshold line (for the SLI)

Hover Over Information: - SLI or PM definition

APPENDIX A: PROCESS WORK INSTRUCTIONS

APPENDIX B: SERVICE NOW USER STORIES