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# Flow Metrics in IT Support & Beyond

How Flow Metrics improve operational  
processes & make permanent work-from-  
home viable for more teams across the  
Enterprise

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## Background to this White Paper

Applications developed by Opimise incorporate new methodologies that need to be explained in context and shared for any organisation to consider adopting. White Papers serve this purpose.

“Flow metrics”, “activity gap metrics”, “day-line metrics” and “timeline metrics” are terms used to describe the methodologies but might not have established meaning elsewhere.

This White Paper might be read in conjunction with the complementary paper “**Progression Note Journals – why ever not?**”

## The Topic

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“ Research consistently shows that in the “New Normal”, most organisations and staff wish to keep work-from-home in the mix.

But common obstacles might prevent it:

- ~ Welfare/ employer duty of care.
- ~ Employee isolation/ lack of teamwork.
- ~ Trust that workhours, or designated shifts, will be covered.

Isolation due to independent work patterns, and importance in covering specific shifts, is particularly present in IT and other enterprise service teams. It means that leaders might need to exclude these teams until adequate new processes are in place.

According to the Institute of Personnel and Development (CIPD), in context of work-from-home, “processes need to... help co-ordinate work and facilitate communication between team members”.

Flow metrics can enhance processes to do this and more. Most importantly, teams and managers are brought closer together.”

David Stewart

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## Target Audience

As discussed throughout, benefits associated with flow metrics reach much further than just work-from-home enablement. It is hoped that anyone working in or around IT or enterprise service management will find the discussion of interest.

## What are Flow Metrics?

In IT, there are at least four, but usually six or more, work activity data types. Flow metrics are formed by bringing all work activity data together. Meaningful information can be produced from this data, for instance a clear picture of each support team member's day.

## Corporate Competitive Advantage

Aside from increasing office downsize potential, organisations that quickly find their way in enabling inclusive work-from-home by introducing the advantages discussed in this paper, will quickly improve their employee experience, so attracting talent and minimising attrition.

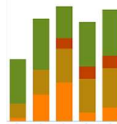
## What's Covered

- ✓ Why **frequent activity** is so important for a front-line service desk, a second operational necessity, commonplace problems with their achievement and why flow metrics have real function and value in removing the problems.
- ✓ How to expose task difficulties and welfare concerns with **activity gap** metrics.

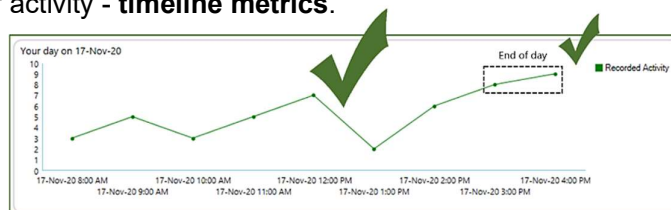
Team Member	Last Activity Timestamp	Minutes to Present
Josh Wilson	10:40 AM	150

- ✓ Two other primary flow metrics:

~ Those that represent a team member's week accurately and fairly - **"day line" metrics**.



~ Those that expose times of the day when difficulty was experienced in maintaining flow of activity - **timeline metrics**.



- ✓ How activity gap metrics can be used to bring **Lean Six Sigma** to everyday work.

## 1. CONCLUSION

The business adage “you can’t manage what you can’t accurately measure” is now more relevant than ever before. To thrive in a future of work-from-home, managers need data that is better than before; data that provides actionable operational insight for improved manageability and teamwork. Fortunately, due to the way IT must and has always worked, this is something that all enterprise service divisions can gain quite easily, as set out in this paper.

**The result:** support service teams can be liberated to work from home with C-level and divisional peace-of-mind.

## 2. Activity Gap Metrics - in a Nutshell

In a work-from-home scenario especially, activity gap metrics are the most useful and actionable flow metric type. They can best be understood with an example:

“Your IT service desk team recognise that frequent activity is necessary for service to be as timely and available as possible. To help achieve it, the team is expected to spend no more than thirty minutes on a single task before escalating to another team.

A team member has unexpectedly not logged, updated, or completed a service ticket or task for 45 minutes. This is known, shown on their manager’s dashboard.

The manager checks-in to make sure all is OK and realises assistance can be provided by a colleague, which is duly coordinated. The manager also realises that the cause was inadequate documentation and so adds this to the team’s improvement register. Once the documentation is updated, future service is provided more efficiently”.

This same scenario, but perhaps following a different time frame, is relevant and applicable across all IT support tiers.

## 3. The Need: Objectives

In IT support and other service teams, team members work largely independently with little need for co-worker collaboration. This is not a good fit for work-from-home (WFH).

It means that new ways of working are required in which teams, team leaders and managers need to keep in regular contact with each other during the course of each day.

To achieve this, three key objectives are appropriate:

- ✓ Position managers much closer to what is happening operationally on the ground.
- ✓ Grow collaborative and collective teamwork, ideally naturally through process.
- ✓ Give meaningful recognition and praise when things are going well.

## 4. Options

With digital transformation tools at our disposal, there are two approaches that can be taken.

The first and traditional approach is intensive hard work by managers and team leaders. There are many disadvantages in taking this approach.

The second approach is to introduce digital capabilities that produce “actionable insights”, allowing managers to “**manage by exception**”. Managers and team leaders can then get on with other things while keeping an eye-out for any sign that a team member needs assistance.

In either approach, all three objectives can be achieved to some degree, but undoubtedly, the modern approach is more appealing. This is especially so because teams who are quietly looked after but otherwise trusted autonomously, will be happier in their work.

## 5. Context for a Digital Solution: Operational Necessities

IT departments are very fortunate in having two operational necessities. Combined, they are the ingredients required for a high functioning digital WFH solution.

The first is that usually, due to high levels of workload demand, frequent activity is vital for an IT service desk. If caught-up on a time-consuming task, timeliness in handling other support needs, especially phone call and other first-response demands, will suffer. Further still, long interactions directly reduce ability to progress ageing tickets (backlog) and keep service customers updated. All of these factors directly impact service experience and can sometimes prevent service from being provided at all.

Inescapably therefore, the work of a service desk should very much be about each team member’s flow in numbers. Indeed, it is prudent for managers to be focused on this necessity.

The second operational necessity - or perhaps more an industry-wide principle - is to capture and record all work demands, requests and tasks in service tickets, as well as journal all subsequent activity across the lifecycle of every ticket.

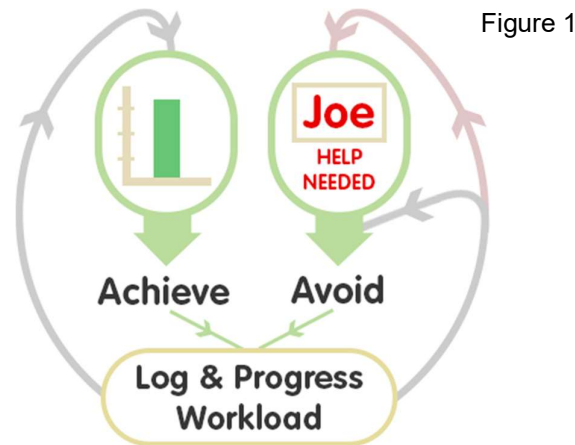
## 6. The Problem & Solution – Flow Metrics

Problem is, without flow metrics, neither operational necessity is manageable. It is almost inevitable that both will fall well short. Even when together in the office, without flow metrics, it is difficult for managers to know when a team member is caught-up and could do with assistance. There is also limited impetus for individuals to make sure a log is kept of everything they do.

The commonplace reality, therefore, is that team members are left to their own devices. Teamwork is heavily weighted on one side, requested by individuals, not proactively offered, or coordinated, by managers.

The solution starts with encouraging teams to ensure everything is logged. The impetus to do this comes from the metrics themselves – from use of “day line” (**achievement**) and/ or activity gap (**avoidance**) metrics as illustrated below.

It is a virtuous cycle in which use of flow metrics motivates population of their data, giving the metrics usefulness in the first place.



Then, knowing that teams keep a record of all activity, if there is a long and unexpected gap, with the necessity and expectation of frequent activity, managers can be quite sure that help or support is needed.

Knowledge of when these “exception” events occur is extremely useful and actionable, especially in a WFH context.

## 7. Activity Gap Metrics

Activity gap metrics present to managers how long it has been since individuals in their team last recorded an activity, in near real-time. If a team member appears not to be progressing workload, it will usually be for one of two reasons:

- The individual is caught-up on a time-consuming task where the cause might be a task difficulty or procedural inefficiency – an **“operational problem”**.
- The individual has been unable to maintain focus or attendance during their standard work hours. The cause might be related to the individual’s welfare.

Whatever the cause, managers have knowledge at the right time to help, support or coordinate teamwork.

Pulse: Time Since Last Activity

Drag a column header here to group by that column

Team Member	Last Activity Timestamp	Minutes to Present
Josh Wilson	10:40 AM	150
Sawyer Watson	12:53 PM	17
Susan O'Conner	12:51 PM	19

As we saw in figure 1, the side benefit is a motivated imperative to keep-up frequent succession (flow) of recorded activity.

Furthermore, natural improvement in levels of teamwork and collaboration might be expected, to keep things moving along.

## 8. Improvement Uplift

There is another benefit in taking this approach. By coming to realise when time-consuming tasks arise, **operational problems** are exposed that would otherwise remain unknown.

Similar in nature to the key IT service management practice of “Problem Management”, operational problems will ideally undergo cause analysis and remediation. Detail might be captured in conversation and improvement items added to an improvement register. With every such operational problem that is then improved or optimised, service operation becomes leaner, faster, and with fewer errors, elevating service experience.

It is equivalent to **Lean Six Sigma functions** happening every day. In doing so, team members are positioned front and centre of making improvement happen, something that can only be good for sense of purpose, workplace satisfaction (ESAT) and engagement, especially if the individual involved is tasked with the improvement work.

## 9. Other Flow Metrics & Performance Motivation

Of the other two main flow metric types, the easiest to produce is “**day line**” **metrics**. This might be shown as daily total activity contribution across a team member’s week.

Usually, the only activity types measured by an IT division are tickets and tasks completed. With flow metrics, included in each day’s metric stack is tickets raised, tickets completed, tasks raised, tasks completed, journal notes and email journals. Even if tasks are not used by an IT division, it is still four rather than the usual one activity type being measured to accurately depict an individual’s day. For an IT service desk especially, this is their performance and contribution quite precisely represented, so aggregated activity data is fit for use in performance management whereas a subset (only tickets completed), is not.

The advantages of taking this approach are not widely recognised. In absence of “day line” metrics, the view might be held that IT support team members should not be judged on numbers. This is perfectly reasonable, but with this type of metric, the opposite view is not only appropriate, but can yield substantial operational benefits.



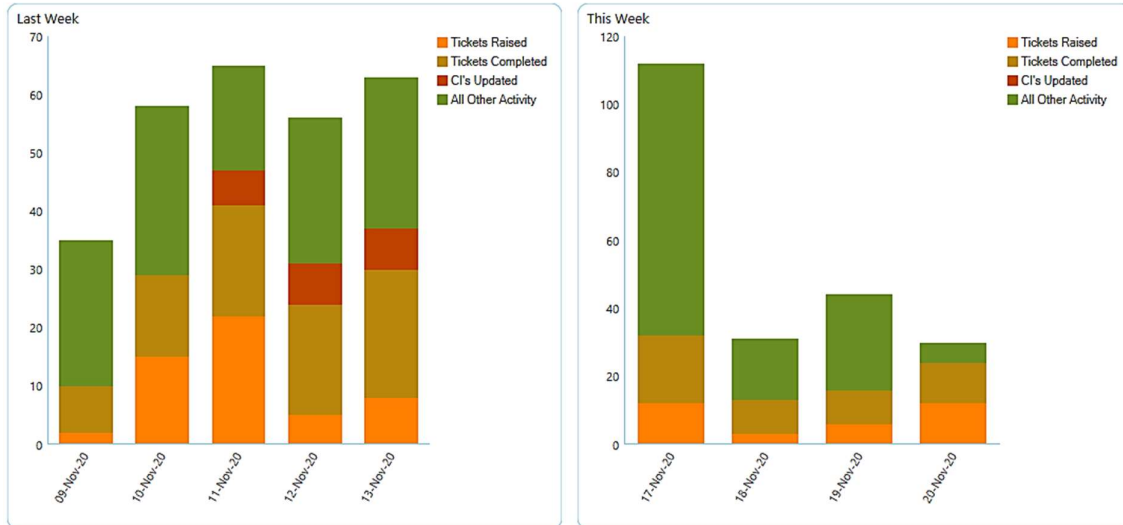
Leading research and advisory firms agree that team members want to have good performance metrics. We all like to know how well we have done, as long as the judgement is accurate and fair. Performance metrics must also relate to a team's purpose, and to gain the most from them, they should be the source of frequent praise commending good results.

Get the metrics right and they will motivate performance; a "carrot" (as opposed to "stick") approach to performance management if you will.

What's more, Gallup Inc. have found that when employees feel their manager holds them accountable for their performance,

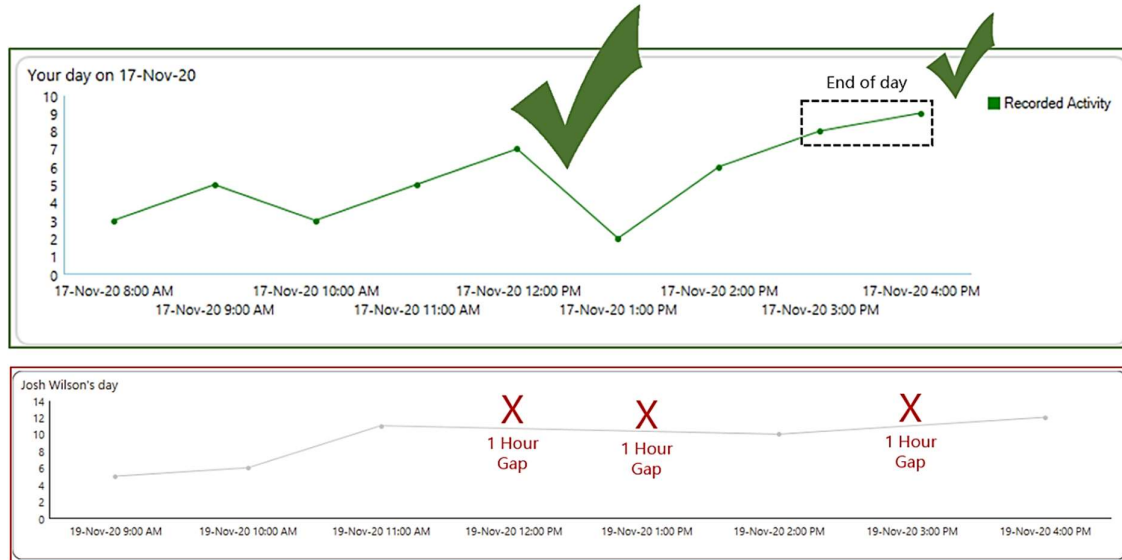
they are 2.5 times more likely to be engaged in their work and half as likely to find work elsewhere in the next twelve months.

Day-based activity totals might be presented to respective team members on a personal dashboard, as illustrated below where a seventh activity type (CI/ asset checks) is included.



Again, the side benefit is motivated imperative to log everything.

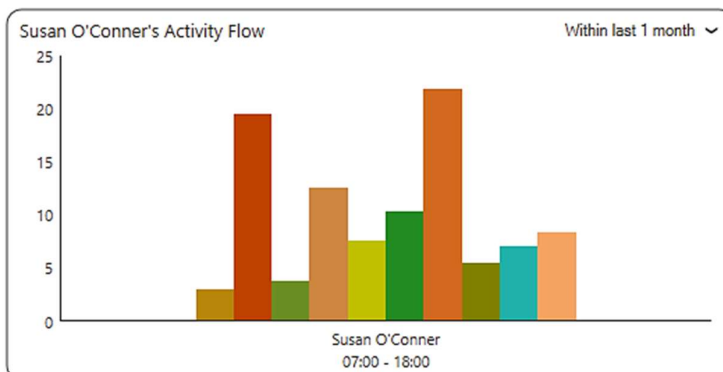
The second other key flow metric is presentation of an individual's activity on a one-day timeline. Used for retrospective insight, **timeline metrics** are especially useful for managers because a graph can clearly show peaks and troughs at certain times of the day, and hour periods when there is no activity, which might be of real concern. This is illustrated in the following graphs.



Perfectly reasonable expectations for most service desk roles might be a quite steady flow of activity, particularly if a guidance maximum interaction time is present, with everyone showing activity at the beginning and end of their working day and no substantial dip towards the end.

Timeline metrics might present hour-by-hour averages over a period of weeks, to expose trends when during the day it appears something is getting in the way of workload progression. With these facts known, preferably by individuals informing their manager in advance, adjustments might be made to ensure service coverage is adequate at all times of the day.

In the below graph, activity has clearly not been steady. It is actionable insight that might prompt a conversation, but a softer approach would be to regularly share this insight alongside other periodical metrics, in a report that might lead individuals to self-adjust.



## 10. Benefits

Flow metrics have the following key benefits for managers:

- ✓ Ability to help and support when needed.
- ✓ Closer relationships.
- ✓ Improved performance.
- ✓ Peace-of-mind, especially in WFH settings.
- ✓ Meaningful, objective personal performance reviews.
- ✓ Everything is logged.
- ✓ Continual improvement boost.
- ✓ Service experience uplift.
- ✓ Happy teams.

And for team members:

- ✓ Can work from home.
- ✓ Managerially supported.
- ✓ Impetus to work as a team and collaborate.
- ✓ Culture of improvement and togetherness.
- ✓ Motivation and engagement.

## 11. Implementation

Flow metrics set out in this paper can be introduced by any organisation, provided a service tool can be adapted as required.

To produce activity gap and timeline metrics, a non-standard data table will usually be required, to store data aggregated from individual work activity tables (for instance ticket, task, journal), by replication at the point of data record creation.

Activity gap metrics might require a further table to be implemented, populated regularly with each team member's most recent activity timestamp.

## About Opimise

Opimise was set up in 2019 by David Stewart with the aim of introducing a new and modern way of working for service teams. Instead of managers working hard to instil attitudes and behaviours required for great service delivery, Opimise methods expand thirteen ITIL practices to achieve this naturally in how ITSM and other service tools are used.

## Applications

Opimise applications have a rich feature-set and some proprietary features not discussed in this paper, including automatically generated Time-on-Ticket (the total time that has been spent working on a ticket), Progression Note journals and Team Together for continuous collaboration. Please visit [opimise.com](https://opimise.com) for more information.

We hope you might want to develop flow metrics yourself. Opimise will be happy to advise how your application can be extended and built for maximum benefit.

If you would like to know when future White Papers and applications become available, please subscribe at [opimise.com](https://opimise.com)