Chapter17: Ticket Classification Worksheet

This Help Desk improvement checklist worksheet is intended to be used in conjunction with the related chapter in the Help Desk Management Book by Wayne Schlicht.

This ticket classification worksheet gives your ticket classification project team a summary of the major steps to complete a ticket classification project successfully.

Step 1 - Start by enforcing support ticket best practices.

Every Help Desk will have processes on how to create and handle support tickets. For your new ticket classification to work well, your ticket data needs to be consistent and follow best practices.

Support tickets are mandatory – Treat support tickets as an official record. For all support interactions, a ticket documenting the support provided must be created.

Ticket documentation must be descriptive – The support ticket documentation must be detailed and descriptive. Ticketing documentation must capture who, what, when, where, and how.

Ticket comments should identify the contributor – As information is added to the support ticket, it is important to know who added the information. Each ticket comment should be associated with the contributor of the comment. This provides an audit trail to the historical record.

No ambiguous classification terms – The ticket classification scheme should not include ambiguous terms such as other, miscellaneous, and issue.

Step 2 - Build your ticket classification project team.

The Help Desk cannot complete the ticket classification project successfully without assistance. It is important that the following experts are part of the project team.

Ticketing Application Administrator/Developer – The incident and service request form in your ticketing application may need to be modified. These experts will be responsible for adjusting configurations and implementing field modifications as needed.

Help Desk Manager/staff – Not only are the Help Desk manager and staff stakeholders, but they should be part of the project team.

Application Owners / Resolver Groups – Escalated support tickets are typically handled by resolver groups outside the Help Desk. Ensure application owners and resolver groups are part of the project team to ensure success.

Knowledgebase Manager – The knowledge base will need to be updated as part of the ticket classification project. To be successful, ensure representatives from the knowledge base team are part of the project.

Reporting Manager – Changes to the ticket classification fields, terms, and structure will require coordination with the reporting team to update the report source links.

Problem Manager –Changes to the ticket classification scheme will have an impact on problem management activities.

Voice of the Customer – If your company uses a self-service portal or other customer-facing processes, it is important to have the representation of customer-focused representatives.

Step 3 -Legacy ticket data collection

Six months of legacy ticket data should be queried and exported. The following ticket data fields should be exported into a spreadsheet.

Ticket number – The ticket number will be the unique key to allow you to review the complete ticket record from the ticketing application as needed.

Classification data – Exporting the legacy ticket classification field data (tier 1, tier 2, tier 3) is important. Include columns and fields for this data.

Ticket summary – Exporting the ticket summary can assist the project team in designing what the new ticket category should be.

Ticket detail – The ticket detail can really provide insight into what the issue is and assist with creating new terms.

Ticket creation date – To understand the frequency of term use, you will need a creation date to run some trending reports.

Ticket resolution summary/resolution code – The resolution summary or resolution code will provide detail of what the issue truly was and how it was resolved.

Agent Name – Exporting the agent name will allow the project team the ability to review tickets with the creator of the ticket.

Escalation group – Being able to search, sort, and group tickets by escalation groups can offer a lot of insight into ticket data.

Step 4 - Legacy ticket data review

Legacy ticket data holds a wealth of useful historical support data. Using legacy ticket data will reduce ticket classification assumptions and will help the project team create the future state ticket classification scheme.

Add future state columns – Add the future state columns to the exported data spreadsheet. These future state columns will hold the proposed terms for the new tier structure.

Add a notes column - An additional column that may be added is a notes column. This will allow the project team to add notes during the legacy ticket date review process.

Highlight data rows requiring action - Creating a color-coded highlight system will identify the specific actions needed at the end of the review.

Group by ticket classification categories. Create a pivot table to display the most and seldom-used legacy ticket categories.

Overused categories - Identify over-used legacy ticket categories, which could be candidates to break up.

Underused categories - Identify seldom used legacy ticket categories and consolidate them with other similar categories.

Isolated incident driving events – Sometimes, an isolated event such as a data center power outage will create a large volume of incidents in a short period of time. You need to disposition how this historical trend may impact the legacy category use analysis.

Eliminate ambiguous categories - Identify and replace ambiguous categories such as other, miscellaneous, and issue with an appropriate category.

Document and fix weaknesses – While you are reviewing the ticket data, you will see many areas of weakness with the ticket data, such as poorly documented titles, descriptions, and summaries. All these issues need to be documented for future agent guidance and training sessions.

Step 5 - Create a future state ticket classification scheme.

While reviewing the legacy ticket classification scheme and ticket data, the project team will start to form ideas for the new scheme. Below are three frequent ticket classification schemes for your consideration.

Ticket Classification Scheme 1 – By ticket type

This ticket classification scheme is based on grouping tickets by what type of ticket is being created. Below are some of the major ticket types.

Incident – An incident is an unplanned interruption or quality reduction to an IT service. The incident ticket type is used when the customer reports that something is broken.

Service request – A Service Request is a process for your Help Desk customers to request system access, information, or a standard low-risk change to be fulfilled. A service request ticket type is used when the customer is requesting something.

Question – The question ticket type is used when the customer is asking a "how do I" question.

Tier structure by ticket type

If you choose a new ticket classification scheme using the ticket type, we have the following suggested keywords.

Tier 1 – Ticket types - such as Incident, Service Request, and questions.

Tier 2 – Service - such as Telecom, Mobile Device, and Infrastructure. These are the high-level IT services you may see on department or leadership reports for the enterprise or business.

Tier 3 – Product name - such as Avaya phone, iPhone, or SharePoint. The product name is the configuration item that makes up the IT service and is the focus of the incident or service request.

Advantages

This scheme identifies ticket types in tier 1 is helpful if the ticketing application does not have a way of separating ticket types.

With this scheme, you are able to distinguish assistance for broken items. You are also able to identify a request for new services and customer questions.

Service Level management SLAs and OLAs can be applied at the root level.

Able to run reports based on IT services for reporting and improvement efforts.

Disadvantages

Using a ticket type term for the tier 1 field will reduce the available tiers to create a more detailed ticket classification scheme.

Tier 2 categories can be very repetitive. You may have to have the same tier 2 terms under each of the tier 1 terms.

This scheme does not include a tier for a verb or action word such as repaired, reset, or installed.

Ticket Classification Scheme 2 – By IT Service

The second ticket classification scheme template to discuss is by IT service. This ticket classification scheme is based on grouping tickets by what IT service where support is being provided.

Tier structure by IT service – If you choose a new ticket classification scheme using IT service, we have the following suggested keywords.

Tier 1 – IT Services - such as Telecom, Mobile Device, and Printing. These are the high-level IT services you may see on department or leadership reports for the enterprise or business.

Tier 2 – Action – Verb of action needed such as configure, restart, and unlock.

Tier 3 – Product names - such as Jabber, bulk printing, and password.

Advantages

This scheme organizes tickets by IT services in the tier 1 field. This type of tier structure works well for creating reports by enterprise IT services. It also works well for quickly determining what the escalation group is that supports the IT service.

The tier 2 field is a verb and clearly identifies what action was taken in the ticket to resolve.

The tier 3 field is the product name, which will help identify the specific component of the tier 1 IT service that support was provided.

Disadvantages

Having too many verbs to choose from in tier 2 can lead to a lot of product name repetition in tier 3.

Tier 3 product name field could be unnecessary in the organization depending on the use of a configuration/asset database.

Ticket Classification Scheme 3 – By department, line of business, or company.

This ticket classification scheme is based on grouping tickets by what department, line of business, or company the customer reporting the issue.

Tier structure by the department, line of business, or company

If you choose a new ticket classification scheme using department, line of business, or company, we have the following suggested keywords.

Tier 1 – Department, line of business or company - such as accounting, marketing, and sales department. Sometimes tier 1 terms can include the line of business or a company.

Tier 2 – IT Service - such as Telecom, Mobile Device, and Printing. These are the high-level IT services you may see on reports for the department, line of business, or company.

Tier 3 – Action – Verb of action needed such as configure, restart, and unlock.

Advantages

Including department, business, or company name in the tier 1 field is a great benefit when tickets are escalated to SMEs and developers in that department, line of business, or company.

This ticket classification scheme simplifies metric reporting to the department, line of business, or company management.

This ticket classification scheme is a budget-friendly structure for ticket cost chargeback to the department, line of business, or company.

Disadvantages

This may lead to classification confusion for organizations with many cross-functional teams.

Using a department or company name as a tier 1 category may force a future classification scheme. If the organization changes its department or company name, the classification structure must be updated.

Step 6 - Apply the future state classification scheme to evaluate

Reclassifying the legacy exported ticket data with the future state classification scheme will make clear where the gaps are.

Select a ticket classification scheme type - Choose a ticket classification scheme to use for your future state. You can use one of the examples previously described or your own variation.

Create a tiered matrix of classification terms - Before adding the ticket classification terms to your legacy ticket data spreadsheet, it is advised to create a tiered matrix of classification terms. This matrix is a brainstorming session of the likely terms that will be used in each of the tiers.

Apply the selected ticket classification scheme to the legacy ticket data - Once you complete this matrix, you can reference this when selecting terms to apply to the legacy ticket data for evaluation. Go through the entire six months of legacy ticket data in your spreadsheet and apply the new ticket classification scheme.
Most frequent problems identified.

Missing classification terms – There will be tickets where there is not a classification from the future state classification scheme matrix that accurately fits with some tickets.

Conflicting classification terms – The team may find two or more classifications from the future state classification scheme matrix, which could apply to a ticket.

Step 7 - Ensure ticket classification category balance.

The adjusting step is a very important review process for your ticket classification project. The goal of this adjustment is to ensure the future state classification scheme is well balanced.

Overpopulated classifications – Ticket classification is less effective if too many tickets are classified under the same term. Identify and break up overpopulated categories into smaller and more specific terms.

Underpopulated classifications – If you have too many classification terms to select from, it will take longer to classify tickets. If you have underpopulated ticket buckets, you should consider merging these into relevant categories together.

Creating reports – When changes are made to the ticket classification scheme, reports that use the ticket data as a source can have errors. Make sure that the reports run, and they can use the new classification scheme correctly.

Resolution support tools – The Help Desk can have tools available that assist the agent in finding a resolution to issues. Testing of these tools must happen to ensure they work correctly with the new ticket classification scheme.

Step 8 - Ensure the support staff are trained

Training is critical to ensure the support staff understands the new Help Desk ticket classification scheme.

Communication – Setting the expectation that the ticket classification scheme is being positively updated is important. It is important to communicate a summary of the changes and the timing of the changes.

Test environment training – We recommend that Help Desk agents receive access to this test environment that has the new classification structure implemented.

Create quick reference charts – It is recommended to have quick reference charts available at each Help Desk agent workspace. The agents will need the ability to refer to the quick reference charts as needed.

Discuss the "review needed" term –Train the support staff that selecting the "review needed" keywords in the ticket classification will engage a management review. During the management review, it will be determined if a new term is needed

Step 9 - Implement the ticket classification scheme into the production

Now it's time to execute the implementation plan. The implementation plan for the new ticket classification scheme involves a few steps.

Understand the process – Changing the ticket classification scheme and updating legacy ticket data may take some time and effort. Make sure you understand the implementation process. Determine if there will be any ticketing application downtime and ensure you have developed a valid backout plan.

New ticket creation - It is recommended to execute the implementation during evenings or weekends to minimize disruptions to the agents. Agents may need a manual process to document support efforts during this downtime and then create the tickets once the ticketing application is available again.

Legacy ticket classification – After the new ticket classification scheme is implemented for new ticket creation, the legacy support ticket should be updated with the new scheme. By updating historical ticket data for at least one year back, you will be able to run reports, perform trends, and facilitate customer history lookup.

Respond to issues - Moving the ticket classification scheme into production may uncover issues that should be addressed. During the execution step, feedback is critical for continuous improvement. To allow users of the ticketing application the ability to provide feedback and report issues, you need a reporting process. Using the "review needed" classification may be the best way of tracking and resolving issues quickly.

Missing terms – If the users identify a missing term, there should be a formal request for the review process to suggest a new term.