

IMF Benchmarking Forum Readout

David Burkett
The Information Management Forum

■ *As you get more information, you get more of the context. If we do interviews with people to understand the context, we can show you that appropriately. The next thing you may wish to ask is: What if I did this? What if I did that? That is where these types of tools come into play.* ■

The Business and Finances of IT ■ Atlanta, Georgia ■ May 10-12, 2006



■ The Information Management Forum

In 1975, five forward-thinking CIOs sat down to lunch in New York to discuss a common problem. Their challenges were growing far more complex, and the available sources of information were either sponsored by vendors or were vendors themselves. This group had a vision; they could foster peer to peer learning in a strictly vendor-free environment.

There were only a handful of IT vendors and products in the 70's. Over the years, the number of IT solutions soared—three solutions for every problem and ten vendors for every solution. Vendor-sponsored networks and research companies proliferated and filled the IT landscape. But The IMF stayed true to its roots, and today operates much as it did in 1975—strictly vendor free!

Our goal is to be *the best source of experiential data in IT for a select group of members.*

The IMF offers to its members:

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Please enjoy this report and please let us know what we can do to help you succeed in your career.

Very truly yours,



Ted Williams

F-1221 ■ IT Management Report

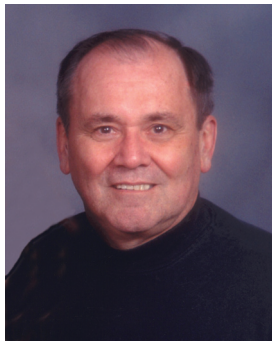
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■ Summary

The Benchmarking Forum is a service available to IMF members to get an overview benchmark quickly and efficiently. This session illustrates the type of information that can be gleaned from a Benchmark Forum study, with particular focus on effective ways of presenting Benchmark data.

■ Biography



Dave Burkett is a subject matter expert within technology planning, systems management, operations, as well as IT outsourcing. Prior to joining Global Information Partners and the Information Management Forum, he served as President of Compass in North America, spanning the activities of the three offices in the U.S. and Canada. Dave joined Compass in 1992, establishing the Canadian operation. Dave has 13 years of experience with IT operations management with The Mutual Group of Canada (now Sun Life). Dave has a Bachelor of Mathematics from the University of Waterloo and is a Fellow of the Life Management Institute. In his spare time, he and his wife, Allison, own and operate an art gallery, Gallery on The Grand, in Waterloo, Ontario.

■ Publication Credits

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About the Benchmark Forum

The Benchmark Forum was initiated to give access to an entry-level benchmarking process (Figure 1). A full benchmarking process can be fairly expensive and time-consuming. A full benchmark gets down to the nitty-gritty if you are gathering several thousand data points. It can take six to ten weeks to gather that data and many weeks to analyze it. It would probably be a full six-month project to look at your whole IT operation at that level and would also likely cost in excess of six figures.

Introduction

The Benchmark Forum is a thin-layer look at the whole IT operation (Figure 2). It is relatively quick, inexpensive and provides a fair insight for the amount of effort. It may not be 80/20, but it is a 60/40 return on your investment. You get substantial benefit for substantially less effort.

In the Benchmark Forum structure, we present a set of general overview metrics about the company. One is *application development and maintenance*. We capture some information on the resources in there, although we do not get into productivity calculations about application development, because that is a deep-dive exercise. Another metric includes *desktop, helpdesk, voice and data network and servers*. For each of those infrastructure products we can calculate unit cost and productivity measures for those areas and provide you with comparative data. Then we have a *management and administration* layer over top of it.

Illustration of a Benchmark Report

Figure 3 (page 4) describes some of what this process might produce, using mocked-up data. This will evolve into more of what a full benchmark might produce for you.

Since this process does not generate thousands of data points, we need to focus on the *insight* rather than *quantity*. We cannot generate 400 bar charts out of this limited amount of data, so we try to gather the most insight. At the end we do

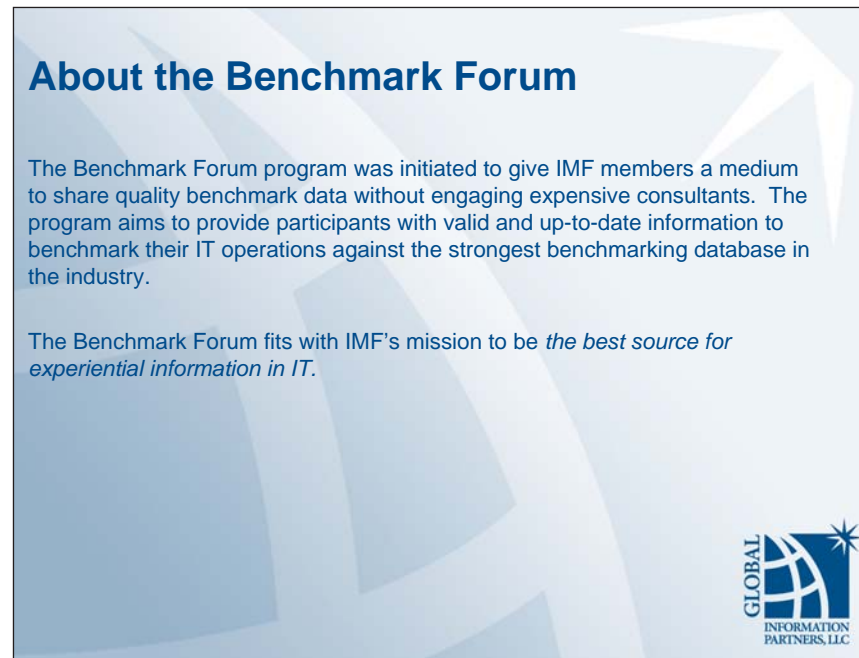


Figure 1

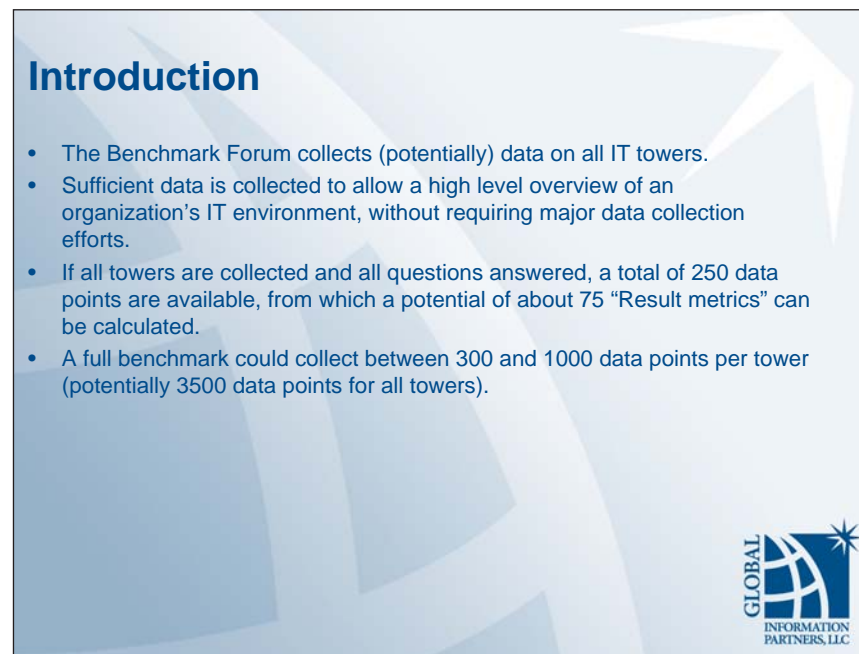


Figure 2

get a fair amount of insight out of a limited amount of data.

In all benchmark processes we try to organize around the concepts of showing you *what*, *so what* and *do what*. *What* is the difference between you and the reference group? *So What* does

that mean if there is a difference? *Do What* is what can be done about the difference. The presentation of the data naturally follows that progression.

Delivering Effective Benchmark Presentations

Delivering an effective benchmark presentation includes showing you the underlying data, a visual representation of the comparison between your data and the reference group values, and conclusions on any delta that might be there (Figure 4). That is the *what*, but as soon as you see that, you will want to know what it means and how it relates to you. You will want to know how to interpret it and the reasons behind it. There are always *yes buts... yes, but we are different*. You will want to know how this relates to the real world; you will want to know if these differences are good or bad. Sometimes a difference is not always valid, but a high number compared to the reference group may be good or bad. You will want to know the impact of making a change. This is the *So What*. It tries to quantify the delta, so we can say: *Your productivity is 14 and theirs is 22. That is a relatively big difference, but put it in perspective. How much money is represented by that delta in productivity?* Again, that is the *So What*. Then you can make decisions about whether you want to act on the information.

If there is a meaningful difference or gap, usually an organization wants to take some action (Figure 5). You will want to think about and discuss the alternatives and what actions should be taken. How would a change in cost influence quality (or vice versa)? In many processes in IT, when an issue pops up and you hit it, it just aggravates another issue on the other side. Hopefully, some of the modeling tools shown here will help in understanding that.

Once you have benchmarked

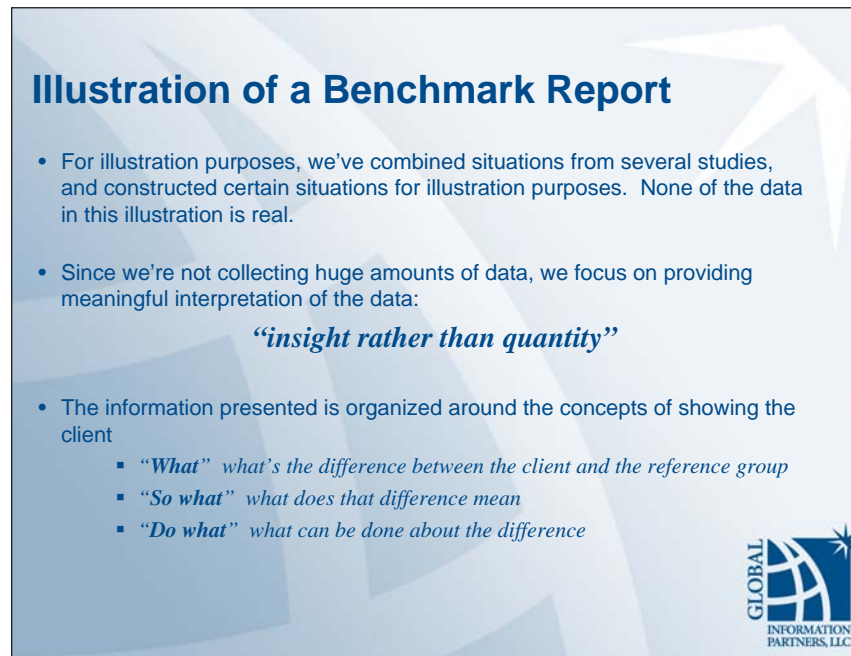
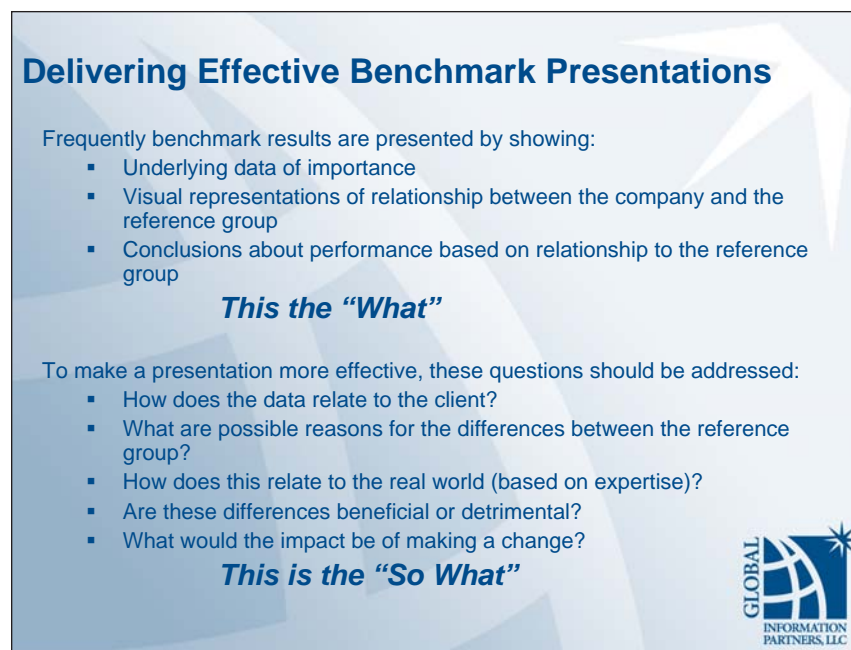


Illustration of a Benchmark Report

- For illustration purposes, we've combined situations from several studies, and constructed certain situations for illustration purposes. None of the data in this illustration is real.
- Since we're not collecting huge amounts of data, we focus on providing meaningful interpretation of the data:
“insight rather than quantity”
- The information presented is organized around the concepts of showing the client
 - ***“What”*** *what’s the difference between the client and the reference group*
 - ***“So what”*** *what does that difference mean*
 - ***“Do what”*** *what can be done about the difference*

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Figure 3



Delivering Effective Benchmark Presentations

Frequently benchmark results are presented by showing:

- Underlying data of importance
- Visual representations of relationship between the company and the reference group
- Conclusions about performance based on relationship to the reference group

This the “What”

To make a presentation more effective, these questions should be addressed:

- How does the data relate to the client?
- What are possible reasons for the differences between the reference group?
- How does this relate to the real world (based on expertise)?
- Are these differences beneficial or detrimental?
- What would the impact be of making a change?

This is the “So What”

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Figure 4

and collected this data, you are naturally set up to measure your progress. All you must do is refresh the data to figure out if you have made things better or worse. That is the *Do What* process.

Now, I want you to play the role of the CIO of ACME, which makes the best widgets west of the Mississippi. You are the CIO, and the benchmarker is standing in front of you saying: *We are going to start off looking at your spend and that of the reference group.*

Total IT Spend

Every benchmarked presentation in the world starts out with this slide (Figure 6). When you look at it, what do you conclude? This slide does not really give you any information, but everyone does it to try and show some perspective. It does not really do that, so next we choose one of the areas and look at *spend by category*.

Spending by Category

Let's look at UNIX servers (Figure 7, page 6). We drill down and show the UNIX server area's cost at ACME versus the reference group, both numerically and graphically. The table is at the top right, and the chart is at the bottom left.

You can conclude there is a bit of difference in hardware, but not much difference in software. However, there is a big difference in personnel. If I present this to you as the CIO, then your next question would be: *Why?* You cannot do anything with that information, right? It shows what the difference was, but that is all.

FTE Detail

Let's take that personnel piece and break it down into compo-

nents (Figure 8, page 6). There is not much difference in management and administration, but there is a bit of difference in direct operations and operations support, and a large difference in technical support and project resources. We are zeroing in—

most of the personnel differences are in these two areas: technical support and project resources. You still cannot do much with this information. You need more. That is the cycle of a benchmark. All this preamble does is increase the desire to know more.

Delivering Effective Benchmark Presentations

If the analysis shows a meaningful difference, then the client (usually) considers taking action to close the gap (either reduce cost or improve service delivery)

- What actions could be taken?
- How would a change in cost influence quality (or vice versa)?
- How to track results of a change.

This is the "Do What"

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Figure 5

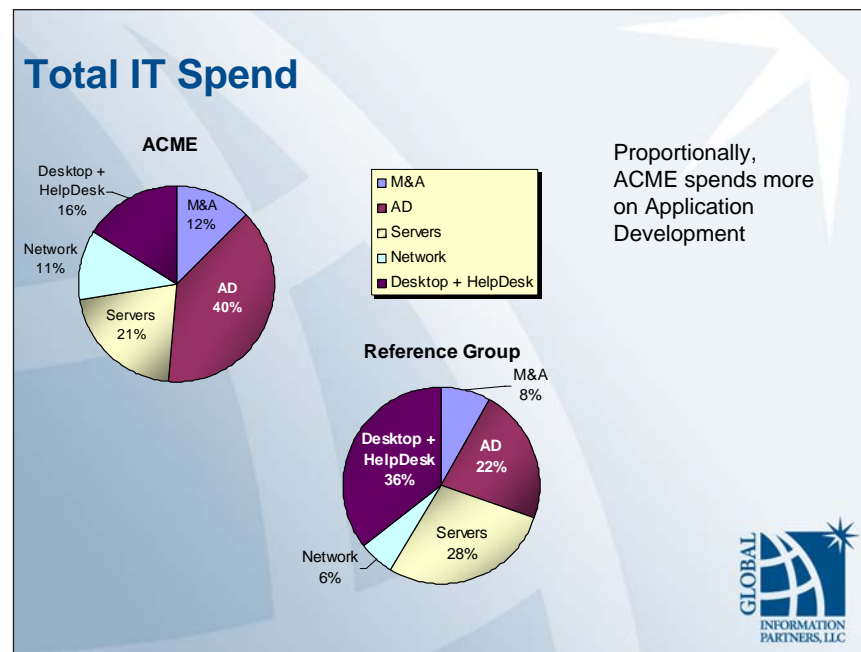


Figure 6

At this point you are looking at absolutes only. Your first question might be: *Do they have the same number of servers that I do? Are they the same as me?*

Productivity

Figure 9 begins to give you some answers because it is a productivity measure or a relevant measure. On a relative basis, ACME has half the productivity of the reference group. You are not off the hook by having a lot more servers. It looks

like you have fewer servers—they outperform you by a factor of 2:1. That is mostly because you have a lot of extra people in those two categories of project resources and technical support.

Productivity: Another View

The next question you may want to ask yourself is: *Are all servers equal? Do my servers look like his servers because you can have little servers or great big servers?* If the differences in demographics are not significant then, that is not a valid conclusion. One of the simplest measures to determine if your servers are different than the reference group is to do the calculation based on the number of processors on average in each server (Figure 10). When we do that, we find that about half the productivity of the reference group is measured on a *per server* basis. You have better productivity measured on a *per processor* basis. That is conflicting information, but it is not at all unusual. We have two indicators pointing in different directions. We still have not determined whether this is good or bad, but we are zeroing in on understanding the differences.

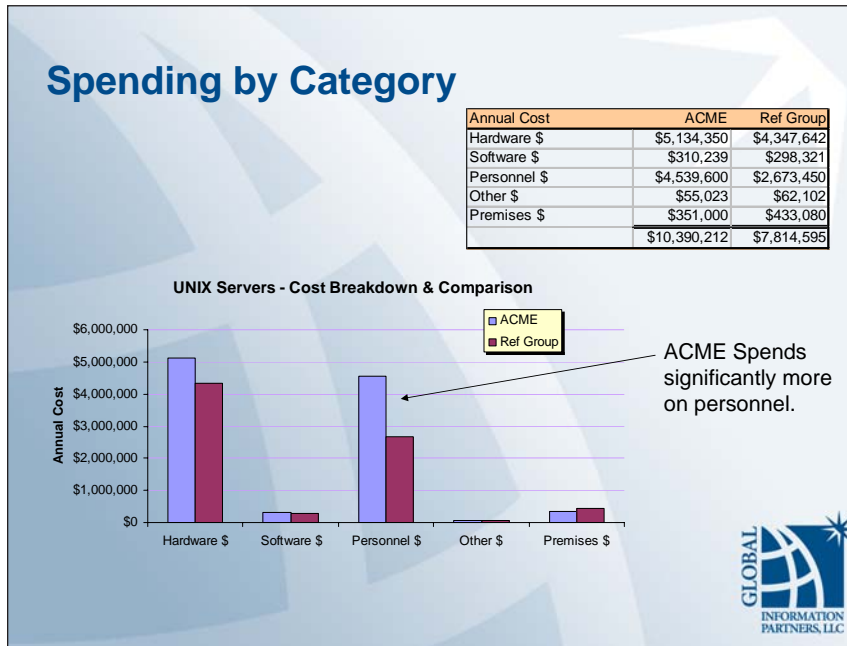


Figure 7

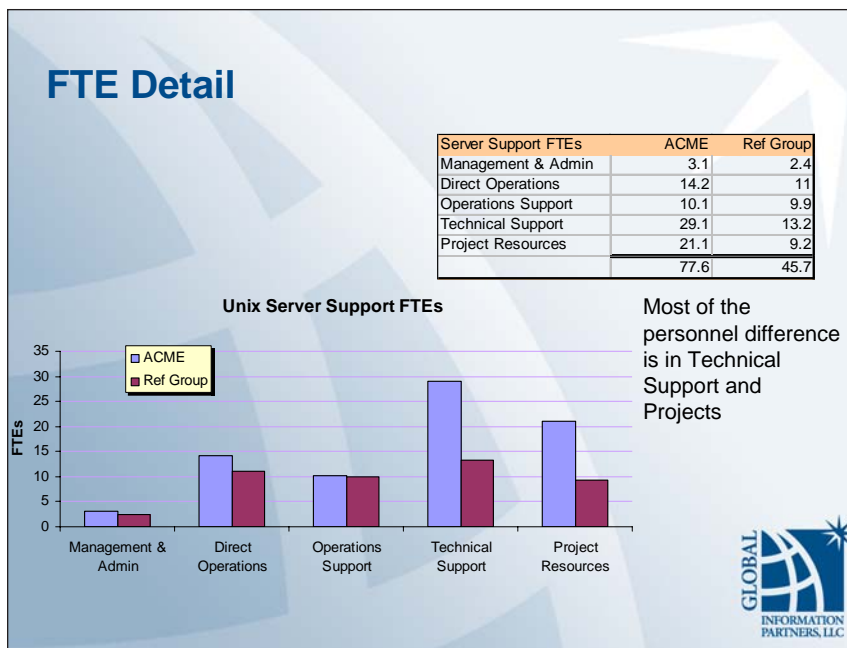


Figure 8

Configuration

Figure 11 (page 8) shows some background information. ACME has 650 servers; the reference group has 802. ACME has 4.8 processors per server; the reference group has 1.9. Clearly, ACME installs differently-sized servers, an environmental difference to deal with. It tells us that if you believe the workload is related to the size of the processor, then you are tending toward using the productivity measure of *processors per FTE* rather than *servers per FTE*.

This is not just a physical thing—there are some other environmental characteristics. The bottom two measures in Figure 11 (page 8) are easy things to measure. How many versions of the operating system do you support? ACME supports 11; the reference group supports on average 5.5 versions. The next measure is the number of hardware vendors. ACME has 5, and the reference group has 2.4. To have 5 hardware vendors, each having a couple of flavors of UNIX, the workload is substantial. The reference group, being *best in class*, has a relatively small number of hardware vendors at 2.4, and 5.5 versions of the operating system. So they have a lower workload requirement than you do.

At the Benchmark Forum level that is the extent of the picture that we gather because our conclusions are from that information. *So what?*

So What?

On the surface, you could conclude that because of the difference between the productivity level of 8 and 17 servers per FTE that you could save almost \$2 million per year (Figure 12, page 8). However, I would be a somewhat reluctant to make that conclusion without understanding the environment a bit better. This is not the analytical benchmark process, but a very necessary part of a process to do a benchmark is to *understand the environment*. You can only do that by talking with the people. *What is going on here? What are you doing?*

It does not take long with a phone call to ask why productivity is poor. So you call the UNIX server delivery product owner, and he says: *I*

told them not to do the benchmark. I told them we were in the middle of a server consolidation project. That is not the time to do a benchmark. You will always be in the middle of something, so it will never be a good time to do a benchmark. You will always have this situa-

tion in one area or another during a benchmark because the area is undergoing change. He says: We are doing the server consolidation. We have added a bunch of project resources to do this. The objective is to rationalize the vendors and operating system versions. That is

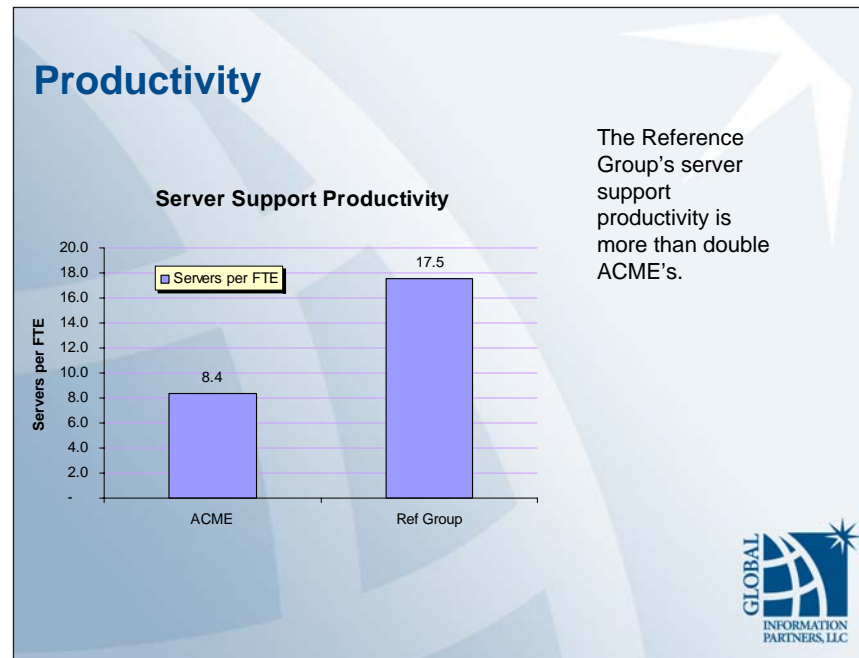


Figure 9

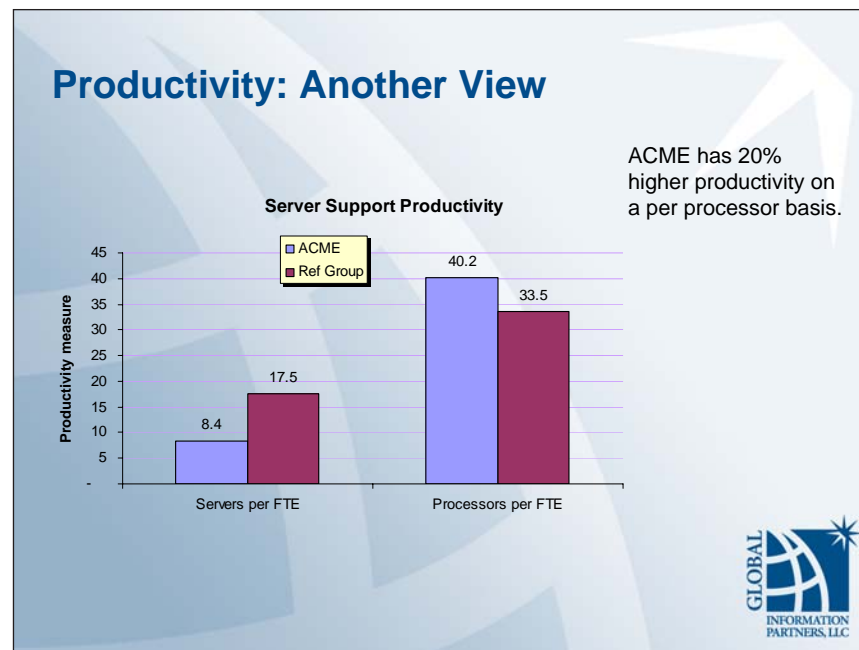


Figure 10

part of the project. When we are done, the budget resources will go down because we can free up the technical support team. All of this makes sense to us now. So what do we do?

Do What?

The correct conclusion is this case is to *do nothing different* for now (Figure 13). You are in the middle of a project, so finish the consolidation project and re-measure following the server consolidation. The re-measurement

provides a framework with which to evaluate the success of the project. You have some productivity targets that you can test yourself against. You have the original study in terms of cost benefit analysis for this project, and now you have some comparative data to do it. While the benchmark does not say: *Make this change and you will save \$2 million*, it does give you the comfort or common framework to understand where you are going. That is not an unusual outcome of looking at a particular area in a benchmark.

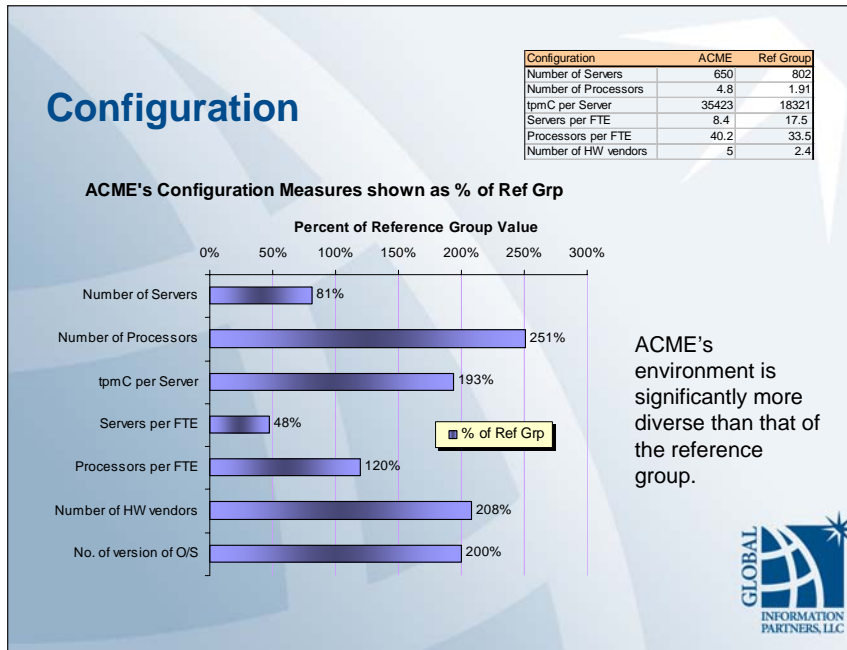


Figure 11

Illustration 2: Help Desk

The second illustration is a help desk environment (Figure 14). ACME has about 1,500 end users and the reference group has about 1,400. Total spending on the help desk is \$827k versus \$500k in the reference group. The cost per call at ACME was calculated as \$21 versus \$28 at the reference group. That is the “what.”

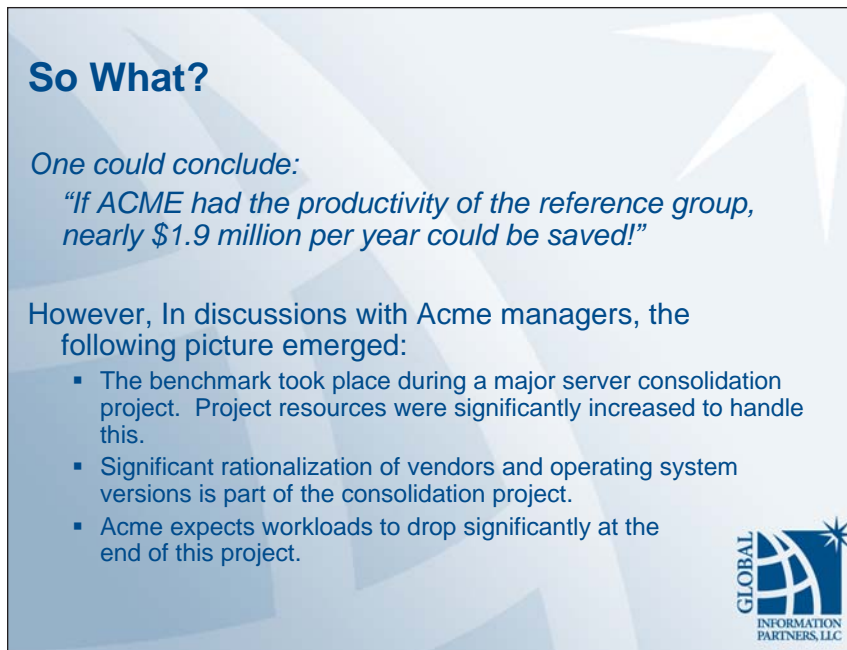


Figure 12

You could conclude that ACME is 18 percent more efficient on a *cost per call* basis. They have a lower cost per call. *So what?* While ACME's absolute costs are \$327 higher, because you are also more efficient, you are really \$190,000 ahead of the reference group. On a surface level, with this information that is about all you could say. You would probably like to see inside this a bit deeper.

The Background

Figure 15 (page 10) provides some background. Once you have the call volume data, you can see that ACME gets two calls per end user per month, while the reference group gets only one per user per month. ACME is very efficient at handling a much higher

volume, but in terms of saving money, the option is to drive the call volume down. We do not know at this point whether this is good for bad. If those calls are unnecessary calls, you are spending money unnecessarily.

There are several other cost factors, which for this illustration are held constant. On a cost per end user per month, we are looking at a difference between \$46 at ACME and \$30 at the reference group to provide help desk service for each user. That is because each

Do What?

The correct conclusions are:

- Do Nothing Different for now,
- Complete the consolidation project,
- Re-measure following server consolidation.




Figure 13

Illustration 2: Help Desk

What:

	ACME	Ref Grp
End Users:	1,500	1,400
Total HD \$	\$827K	\$500K
Cost per Call	\$21.21	\$27.79

One could conclude that ACME has a Help Desk which is 18% more efficient on a cost per call basis.

So What: While ACME's absolute costs are \$327K higher, ACME's unit costs are 18% lower (resulting in a \$190,000 lower cost compared to the reference group)




Figure 14

While the benchmark does not say: *Make this change and you will save \$2 million, it does give you the comfort or common framework to understand where you are going.*

user called the help desk twice as often.

Do What?

What do you do about this (Figure 16)? I chose two areas that will not have any fuzziness about them. Before we draw any

conclusions we need to understand the culture. You want to be careful of help desk cost metrics. If you focus on cost per call, the cheapest call is one that does not come to the help desk. It is a call that stays in the department. On average it costs

the organization two and a half times as much to answer a question within the department as it does to call the help desk. It costs IT nothing. An easy way to shed \$827,000 is to close the help desk and handle it within the department. However, it costs more for them to do that than to call the help desk. You must be careful.

The other variable might be the kinds of calls this help desk handles, compared to the reference group. If it is just IT problems, that is one thing. If they also handle employee benefits change applications, then you need to understand that.

It may be that the end users just do not have the right tools or the right training, and they cannot answer these questions themselves. Then they may be calling the help desk with questions that could be avoided. By building a self-help application, you could reduce your cost.

You cannot answer this at this point without understanding the category of tracking. You have to implement call category tracking to see the profile of calls that are coming to the help desk. That is not a level that we get involved with in the Benchmarking Forum, but it is a level you need to get to before you can draw an effective conclusion. You need to know whether you need training at the help desk or with the end users, or self-help techniques or Web applications. Are those ways to save the organization money?

Displaying Large Volumes of Data

It is challenging to present large volumes of data back to the client

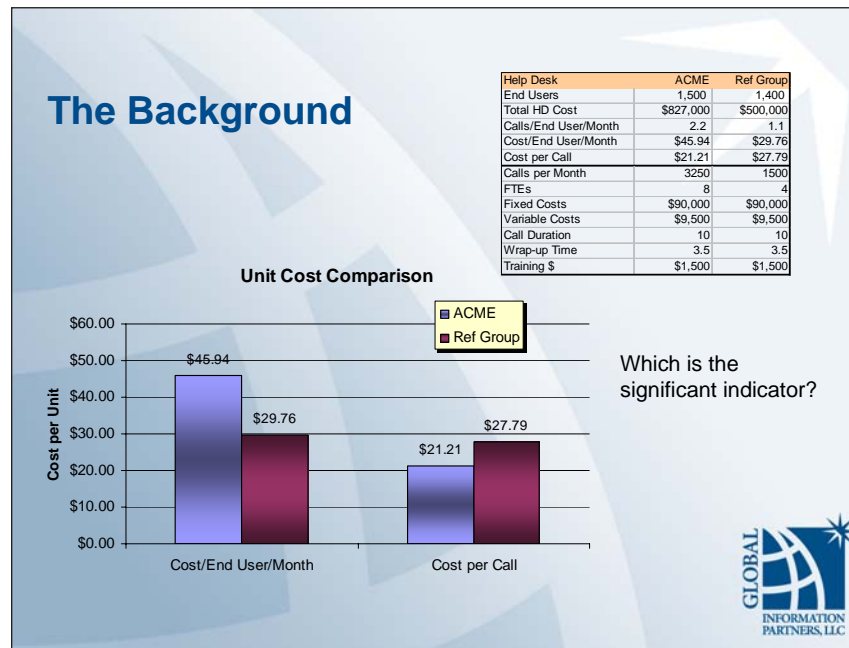


Figure 15

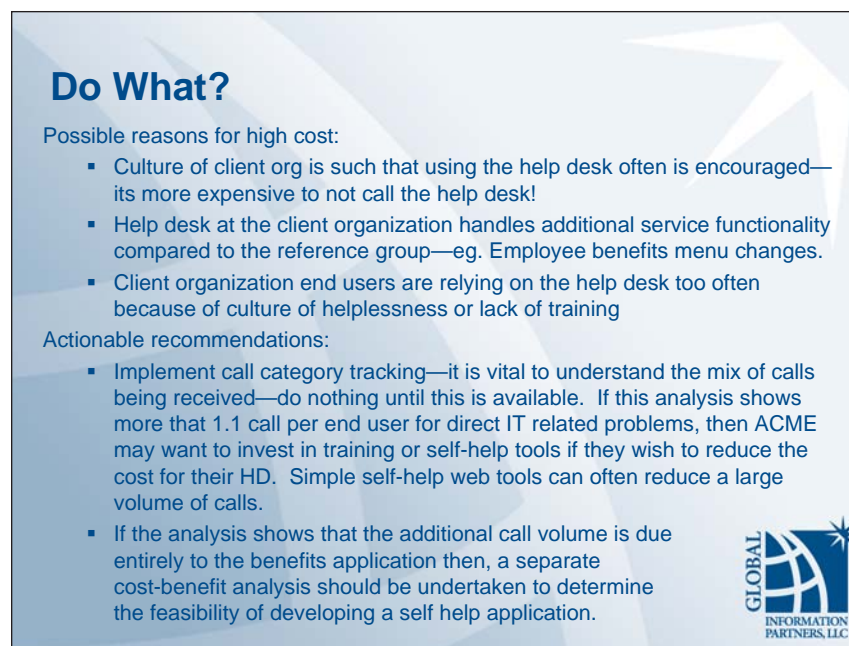


Figure 16

(Figure 17). We can do large numbers of charts, but that is difficult to assimilate. We can try to pack all of the information into one chart, but that is hard to interpret. That is the problem with visualization techniques. I will show you some of the poor man's versions of that—things you can do with a few *Excel* keystrokes that make this look better without resorting to a full information visualization software tool.

Example One

We often get involved in analyzing things like budget actual data. One of the things we benchmark is financial management processes. How well does the budget

Displaying Large Volumes of Data

- Particularly challenging for a consultant is the presentation of large volumes of data. There are a variety of techniques to assist in this—some simple, some more sophisticated.
- In general, large numbers of charts are hard to assimilate, while complex charts are hard to interpret.




Figure 17

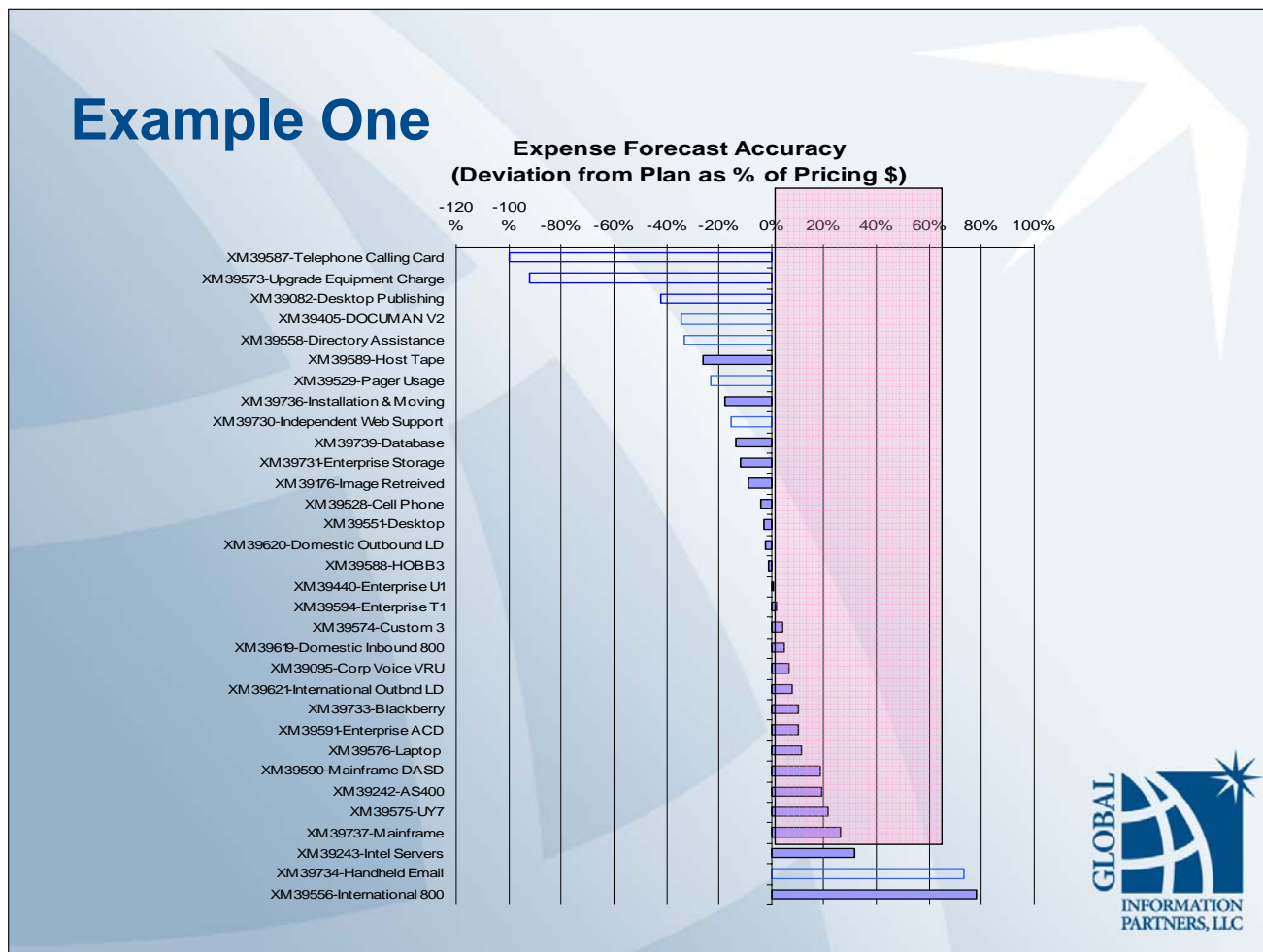


Figure 18

measure on how well that product is defined and how accurate this organization is in predicting volume. If you are going to do product pricing, you need to get your expenses right. You need to forecast your expenses and forecast your volumes. If you set the rate, then you have to live and die by that rate. If the volumes do not achieve, then you do not recover enough money or you overcharge. From a pricing perspective those are the three main variables: the extent of your accuracy, the volume prediction accuracy, and actual costs. Then there are some service level objectives such as how well you do in setting levels and adhering to them.

Example Two: Circuit Data

Sometimes you get a large volume of data. With things like circuit data the circuits will run into the hundreds (Figure 19). One way to manage this is to put the data into a scattergram and figure out what it is telling you.

Large Data Illustration

If you have really large volumes of data, then a scattergram would be too complex (Figure 20). In this case for the volumes we are looking at, a scattergram gives you everything you need to know about this.

Two Related Dimensions

Two-dimensional views are easy to do and sometimes give you a fair bit of insight into data: whether it is all clustered together or more distributed than it appears to be (Figure 21). There are easy ways to chart this information in order to gain some insight.

Modeling Tools

Modeling tools present a third option (Figure 22). You have some benchmarking information around an IT process. What that gives you is a bunch of measures, performance, cost components, and volumes. They can all change.

It is difficult in most situations to get your mind around the relationships between evolving change and what that does to cost. With an accurate fixed variable cost model, it will be hard to predict how changes can affect your cost.

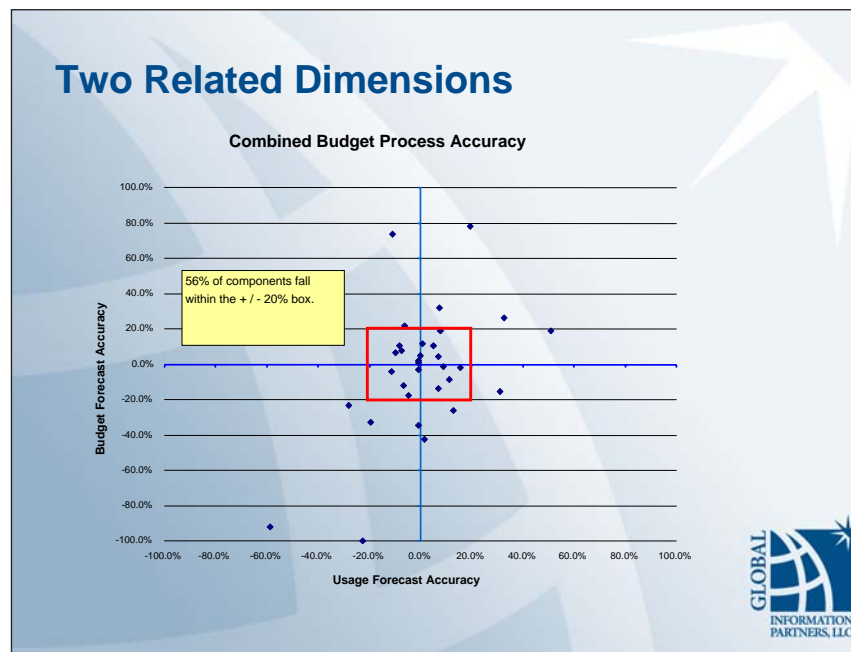


Figure 21

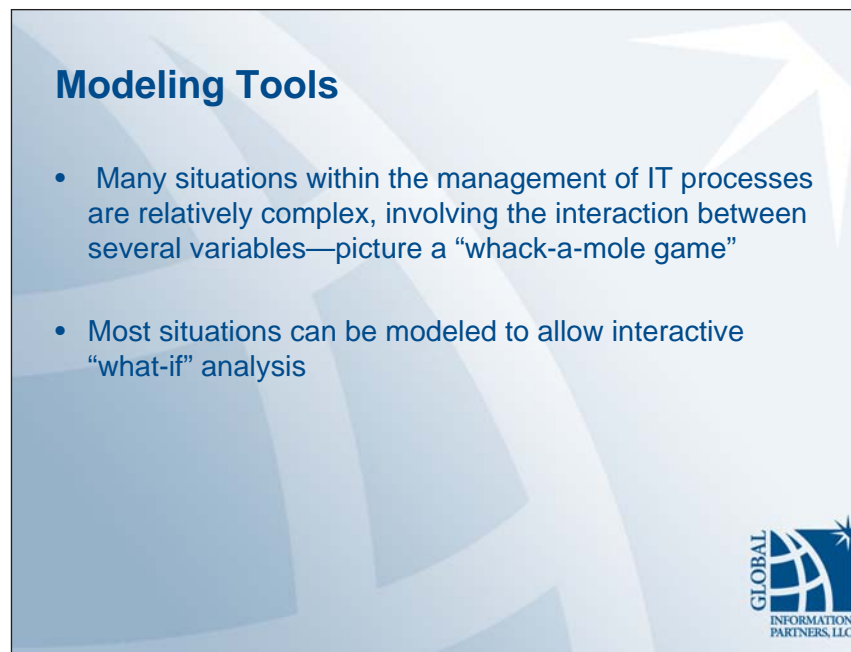


Figure 22

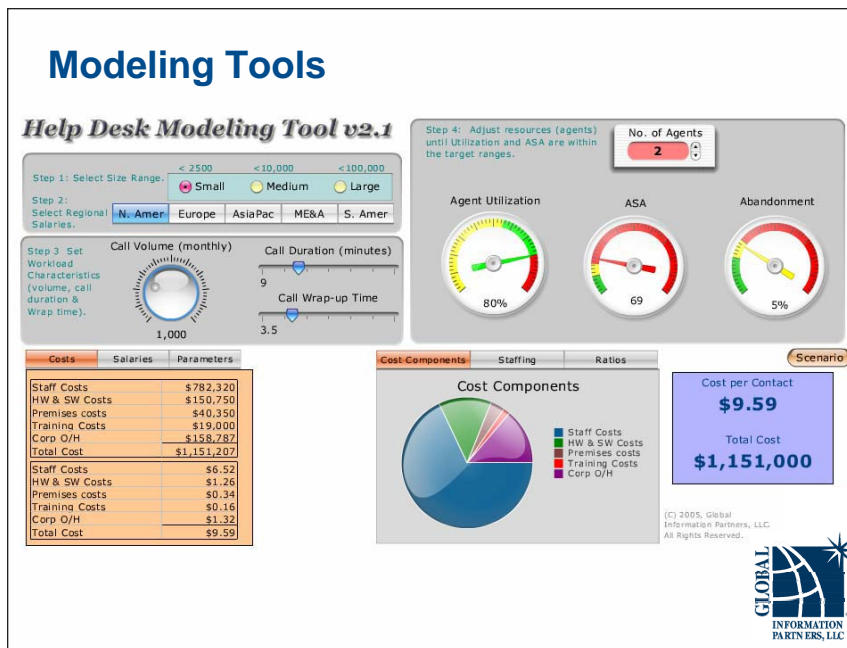


Figure 23

I would like to go back and illustrate the help desk situation discussed earlier. We present this benchmark to the help desk manager, and he says: *Help me understand what I should be doing. Help me understand my operation.* There are techniques like this that are straightforward modeling tools (Figure 23). For most IT processes we build a model. We have the advantage of seeing observations from 10, 20 or 50 companies. Given those observations we can use regression techniques to show the relationship between this and that. We can build equations that say when volume goes up that has this effect on productivity, this on cost, and so on. We can build those underlying equations based on the observation data that we have available. Then it is a simple matter to put it in this form and say: *Let's reconstruct the ACME situation.* ACME's call volume is at 3250, so I adjust the call volume control. We set the salaries to the right geographic category. We

have the fixed and variable costs on the lower left. If you recall, call duration was 10 minutes. He didn't have 11 agents—he only had eight. If he had 11 agents, then the average agent utilization is 48 percent. The average time to answer the phone is pretty good at 23 seconds. The abandonment rate is pretty low, so we can start taking agents away. As we take agents away the cost changes. We get down to eight agents with 66 percent utilization of the agent and 27 seconds to answer the phone. We generate an abandonment rate that is still in the three percent range, which is acceptable. Getting the three dials on the top right into the green zones represents a stable situation a help desk manager would be comfortable with. Now we have cost components of \$827,000. It is a pretty good fit. This model is actually evaluating the equations, which generates the same end result as the real work situation.

This tool lets the manager play the ultimate *what if* games. What if we put a new application out that generated a lot more calls? What happens if our call volume went to 5,000? We do not have enough agents. We just cannot do that, so how many agents will we have to add in order to get performance back into the reasonable range? I could live with 35 seconds. We would then need at least 11.5 agents. To have really world-class performance, we would need 12 or 12.5 agents. What would happen if we are back at our 3200, but our call duration went up? With an application change it takes an agent a lot longer to resolve the problem, and the average call goes up to 14 minutes. We are back with our eight agents again. Oops, we get six percent of them in the rate and 78 seconds to answer the phone, which is unacceptable. We would have to run at about 10.5 agents to handle that situation. What if we could change our fixed hardware costs? We could change different hardware and tools and get the cost down, but what would that do? You can play all the test scenarios.

We have observations of personnel costs around the world. What would happen if this help desk moved to the Singapore subsidiary? We would drop from \$18 to \$11, using Singapore salary numbers. We may have to add some communication cost increases, etc.

These techniques complete the cycle in my mind from benchmarking. Benchmarking at the start poses many questions. It increases the demand for more information because it teases you with comparatives—you need to know more and more detail.

One of the things you need to be cautious of is that when you start you will end up with a longer process than you think, because you will want to dive deeper into it to get all of the information. Think of the Benchmark Forum as an interesting overview, but it will not decrease the demand for additional information. As you get more information, you get more of the context. If we do interviews with people to understand the context, we can show you that appropriately. The next thing you may wish to ask is: *What if I did this? What if I did that?* That is where these types of tools come into play.

Question: In terms of what the Benchmark Forum is providing, are you going to be building starter models of this type that people can look at if they are unsure of how to look at their environment yet? Give me a way to look at it, and I know these things can help me, right? Then I can play with my culture and look at these things and say: *I do not even know if this is the right way to look at it, but at least it gives me a framework to go through.*

Burkett: That is exactly a great use of this bridge because the Benchmarking Forum gathers a small amount of data. You want to draw detailed conclusions but you have a small amount of data. As an alternative to spending the 6-8 weeks getting the total amount of data, you can jump over and look at the hypothetical situation. Maybe with the model you can get an understanding of everything without having to go through that deep dive.

Question: So along with this, for the dives, we would get a description of what that is and maybe an idea of how that information was derived so that I might be able to say: *I understand the time to answer. That is one that I can plug in right away.* Of the 12 or 15 inputs shown in Figure 23, I might have two that I really need to go after, or perhaps I need to do this differently than is modeled here.

Burkett: If you do not have specific details, you can say: *Let's assume I am no different than the comparative group.* On average, the second dial on the top right of Figure 23 is percent of agents on available times. You may not measure that or know that exactly, so until you can get it you can use the reference group value of 18 percent. If you come up with better data then you will find your specific points.

Question: Have you already done some of these that are available now?

Burkett: I have built dashboards like these for four or five of the more common IT processes. There were also two ways to do it. There is the email level, which allows you to understand the cost components of delivering an email service. There are techniques to use that are nothing more than using a tool to interact with detail level data. Sometimes it is hard to make your way through a bunch of detail data, but this one lets you look at the high level on one side and the detail explosion on the other. There are drill-down techniques as well. They do not

really do the modeling, but they let you explore the data. I have them for email, help desk and some mainframe processes. We have models built with underlying equations that I am reasonably comfortable are close to reality. It fits the observed information that I currently have available.

Question: As a group, is there a way that people will provide input back and add to the details of that model?

Burkett: Every observation that goes back into our database lets me rebuild the equations with more accuracy. The more data we have the better the progression process is. If you do it with two, it is not a very good fit. If you do it with 22 observations that are reasonably consistent, it is a better fit. If you have 22 observations that are all over the map, then you are missing some variable clue.

Ted Williams, The IMF: We provide data first. So we validate the data first, and then we give it out.

Burkett: This started from me standing in front of groups presenting benchmarking data and watching people leap to conclusions that I was not comfortable with, and taking courses of action that I was not sure were the right things to do. They were making decisions without the full understanding of the relationships. This kind of tool gets you closer. 📊

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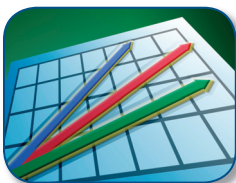
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