THE ESSENTIAL GUIDE TO

SELF-SERVICE SUCCESS

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Introduction

Self-service, particularly self-service technology, is often touted as a way for cash-strapped IT organizations, with overworked service desks, to save time and money.

HDI research has self-service as the cheapest method of handling support tickets – at US$10 per ticket along with chat and email. Whereas phone-handled tickets cost US$14 and walk-up U$20 (source: HDI "Support Center Practices & Salary report" 2014).

Ideally though, the real financial benefits will come from self-help, meaning that end-user issues never reach the service desk giving a close-to-zero ticket-handling cost from an IT perspective.

However, notwithstanding the fact that a dollar saved by IT through badly-implemented self-service might incur an extra two dollars of costs from an end-user perspective, cost savings are not the only driver for self-service and for many it's not the most important benefit.

Read on to find out the benefits of self-service, capabilities to consider for IT self-service, how ready your organization is for self-help, common barriers to self-service success, and top tips for successful self-service implementation.

5 Key Benefits of Self-service for IT

The most-commonly quoted and sought after self-service benefits

Not all corporate IT organizations are the same. They will be working within different corporate cultures and to different corporate strategies, both of which will influence IT service delivery and IT support. Most IT organizations will however seek to reap one or more of the following benefits from their self-service initiative:

1. Cost savings. Self-service saves IT money by letting the end user do what the service desk previously did. Whether it be the capture of incident or service request information, or full-blown self-help through the use of a knowledge base. However, there are a number of important things to bear in mind from a cost-savings perspective. Firstly, self-service needs a certain level of end-user adoption to actually save IT and the business money – and with minimal adoption the self-service project/investment might not even break even. Secondly, self-service needs to be more than a telephone call or email replacement, as the real cost savings are in the use of backend workflow and automation, and better decision making through transactional insight into supply, demand, and financials.

2. Improved availability and efficiency. HDI research reports that circa three-quarters of support centers aren't staffed around the clock. Thus self-service can simply provide increased support availability – even if only for the most basic of IT issues. But self-service availability also goes beyond single-geography opening-hours limitations, providing support for more languages and time-zones at a far-lower cost than employing native-language speakers across global organizations. In terms of increased efficiency, self-service can benefit both service desk agents and end users, but again the real efficiency benefits will only be realized from backend workflow and automation to speed up issue resolution or service delivery.

3. Easing service desk workloads. Taking end-user contacts away from the telephone channel can have a big effect of service desks. Firstly, end user self-help, via a knowledge base, results in fewer calls to the service desk, giving a reduction in ticket volumes and thus in service desk workload. Secondly, the self-service logging of issues and requests, as with end-user contact via email, doesn't always require an immediate service desk response and consequently the service desk can work on self-service-created tickets at less-busy times of the day (as long as priority levels and service level targets are still being met).

DID YOU KNOW?

56%

of service desk professionals believe self-service influences ITSM tool selection.

4. Better prioritization of issues and requests. Telephone contact and the modern appetite for first contact resolution means that many service desks have drifted from dealing with issues and requests based on priority to more of a first-in first-out (FIFO) operation. Where end users are dealt with on a first-come, first-served basis rather than based on any form of intelligent differentiation. Self-service can aid prioritization, firstly as outlined in the previous point – the immediacy of response is dropped in favor of addressing the most important tickets first. And secondly, self-help removes many of the simpler, and potentially less-important, service desk contacts to allow the service desk to spend more time on the more complex, and potentially more important, issues. With self-service password reset a great example of this.

5. Keeping up with consumerization and delivering an improved customer experience.
Like it or not, end users are doing more than bringing their personal IT into the workplace.
They are also bringing in their personal, consumer-world expectations of IT, technical
support, and customer service. In terms of access and communication channels, employees
are now expecting to see consumer-grade self-service capabilities, including issue logging,
service request catalogs, and knowledge availability for self-help, in the workplace. Plus
anytime, anyplace, any device access to services, information, and help.

But which self-service benefits are considered the most important?

While self-service cost savings will be important to most IT organizations, the non-financial
benefits are important too. In fact, a 2015 HDI Research Brief, "Technology for Empowering
End Users," identified the top three benefits of self-service ("online form") use as:

1. Improved customer satisfaction/user experience
2. More efficient support
3. Improved perception of IT

With cost savings seen as secondary to improving how IT service and support is provided.

11 Capabilities to Consider for IT Self-service

Once you are convinced of the advantages of self service, it's all up to introducing self-service in your organization now. Even if there's very limited self-service capability or limited end user adoption, this section might help you make the next step.

Think self-service capability not self-service technology

In my opinion, as with the growth in smartphone and mobile app use, consumer-world self-service technology is becoming less obvious and less important to end users. What is instead more important are the offered capabilities and the ease of access and use.

For example, and continuing with the smartphone analogy, a mobile app providing train times and real-time status updates isn't considered software or technology by its users. Instead it's just a "capability" – it merely provides the information that's needed, when it's needed. And corporate self-service is similar.

So while the corporate IT organization might see self-service as a mix of self-service applications, compute, storage, and networking, those who use it see it as a capability. A capability through which they can access help, information, or services. So it's wiser to think of self-service as a capability, or even a set of capabilities, than a mix of technologies. With a need to rise above the technology and what it can do to see end user use cases and how end users want to engage with self-service capabilities.

The key self-service capabilities to consider

In terms of available capabilities, self-service can be so much more than an IT storefront, a service request catalog of available IT services, and an associated shopping basket function. Instead self-service could possibly include some or all of the following:

1. Self-help via access to FAQs and other helpful information. It might be "how-to" guides, common fixes, workarounds for known problems, and even the use of YouTube videos for those that prefer visual rather than written assistance. Longer term, as with the majority of self-service capabilities, self-help can be extended outside of IT to support other corporate service providers such as HR, facilities, and legal.

2. The ability to quickly log issues and service requests for resolution by IT personnel. Rather than one person talking while another types, the need is instead logged by the affected end user. Ideally saving both the end user and service desk, but ultimately the business, time – especially if the telephone channel involves queuing.

3. Status checking. The ability for end users to self-check the status of an incident or service request – saving both the end user and service desk time. 61% of organizations currently offer this capability (HDI).

4. Broadcast alerts and individual notifications. This could be a global self-service portal notice stating that a certain business application is going to be unavailable overnight. Or notifications to end users when the status of their ticket changes.

5. A password reset capability. Where the end user can reset their forgotten password or unlock a locked account. 54% of organizations currently offer this capability (HDI).

6. Downloads. The ability for end users to download pre-approved software and patches as needed. 30% of organizations currently offer this capability (HDI).

* The HDI statistics are from its August 2015 report "Technology for Empowering End Users."

7. Chat. Access to service desk agents as needed – as sometimes human-to-human interactions are needed to help understanding or to expedite matters. For the end user it can be a lot quicker than waiting in a telephone queue or for an email to be responded to. And the service desk agent can realize efficiencies by handling multiple chats simultaneously.

8. Collaboration with other end users. Access to communal collaboration spaces such as communities, forums, wikis, and other peer-support mechanisms. 54% of organizations currently offer this capability (HDI).

9. Access to IT-asset information. Allowing end users to understand what IT kit they have, potentially against a checklist of what their role should have. It also offers organizations the ability to get end users to remotely participate in asset audits.

DID YOU KNOW?

81%

of organizations currently offer some form of "online form" for end users to submit support issues and service requests to the service desk

10. Links to handy external sites. Self-help doesn't have to be limited to corporate knowledge articles.

11. Automated delivery. The use of as much automation as possible for service fulfillment, incident resolution, and update notification. It's where much of the efficiency and cost benefits lie. While this list covers the most commonly adopted options, you might be able to think of even more possibilities.

These are mere "options" because your organization might not need all these capabilities. Instead they are a portfolio of self-service capabilities to be considered against your business' pain points and opportunities.

Is, or was, Your IT Organization Actually Ready for Self-service?

Now that your objectives are clear, this should help guide you while taking a phased approach to self-service initiatives to maximize adoption and the associated benefits.

You can't escape the growing interest, and adoption levels, of self-service for corporate IT. And there are definitely self-service benefits to be reaped via a number of different self-service capabilities. But is your organization actually ready for self-service success?

Or, if you're reading this after an unsuccessful self-service initiative, was your organization ready for its self-service launch? And instead of blaming the self-service technology for the low adoption levels, might it have been more to do with the corporate IT organization's level of preparedness?

Self-service technology is at best only part of the answer

An organization might have spent a considerable amount of time, money, and thought selecting the right self-service technology. It might have also invested in ensuring that the self-service capability is something that end users would want to use.

But end users still might not use it. Not because they don't want to use it. Not because it's difficult to use. But because they can't find the help they need, or because what they do find doesn't actually help them. It's the equivalent of buying a new car, teaching someone to drive (and the benefits of driving), but failing to fill the tank with fuel.

*The statistics are from SDI and Freshservice's report "Life on the service desk in 2016: A view from the frontline."

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So self-service readiness is about more than the technology and the education of end users. It's also about ensuring that there is sufficient fuel, especially for self-help, to power the required end-user journey. This is where the concept of level zero solvable (LZS) can help with self-service success.

The need for the level zero solvable approach

Sadly, a common mistake made by corporate IT organizations implementing self-help capabilities is launching a knowledge base before it's truly fit for purpose.

The knowledge base might house lots of content, knowledge articles, that has been created with love – but if the right article can't be found, understood, and then used for self-help then there might as well be no knowledge articles. Plus, there's the issue of insufficient (knowledge article) coverage across the spectrum of common end user issues.

This is where LZS can help IT organizations, it helps them understand their level of preparedness for launching self-help and self-service.

LZS explained

LZS is a measure – the percentage of incidents that could have been resolved by the end user via self-help. And LZS can be used to gauge the chances of self-service success by predicting the level of end user success with the knowledge base.

If organizations can reduce the risk of end users thinking that the self-service, or more specifically self-help, capability is useless then it will increase the probability that end users will use it again. Conversely, if an end user finds self-help to be of little or no value, then they will most likely not return to the self-service capability.

So those responsible for delivering a new self-service capability need to ensure that the knowledge base is sufficient for the most common, simple IT issues to be self-solvable by end users. It's definitely a quality over quantity scenario – in that the knowledge base might have sufficient knowledge articles for a service desk agent to resolve the common issues but:

- Can end users find the right articles when searching for help using their language and terminology rather than IT's?
- Even if end users find the right knowledge articles, are they created in a way that allow the end users to understand and successfully use the documented resolutions?

Calculating LZS

There are two options for calculating the LZS metric – one might slow down service desk operations, the other might be seen as duplication of effect.

The first requires service desk agents to search the self-help knowledge base, while dealing with end user issues, as though they are the end user trying solving the issue via self-help. If the end user issue can be resolved using an available knowledge article, then the incident record can be flagged as "LZS." With the metric then based on the LZS-flagged records as a percentage of the total number of records handled that month. So a service desk will have 40% LZS if four out of every ten issues handled could have been solved by the end user using self-service.

Alternatively, to save service desk agent time and to reduce the operational impact of the LZS approach, the LZS metric can be calculated by project staff on a sample basis. Either way, the higher the LZS metric is, or gets, the higher the probability that end users will use self-service successfully and continue to return in the future.

However, it's important to realize that just because there's an available knowledge article to help resolve the issue, it doesn't mean that the issue can be flagged as LZS. It only means that it could have been LZS, i.e. if the knowledge article was more suitable to end user needs. Ultimately, LZS needs to be used honestly, as dishonesty with LZS can only increase the chance of self-service launch failure as knowledge articles intended for self-help either can't be found or used in anger by end users.

LZS post-launch

After the launch of a self-service capability, the LZS score will decrease as self-service adoption rises, i.e. the majority of issues that are LZS are now hopefully being resolved through self-help. But the LZS approach doesn't stop here.

Instead the paradigm is flipped – whereas before launch the requirement was to get LZS as high as possible, post-launch the level of LZS issues hitting the service desk should be minimized (see the diagram below where the red line shows the self-service launch). With the issues hitting the service desk now analyzed to identify the need for additional, or improved, knowledge articles and other opportunities to improve the self-service capability.
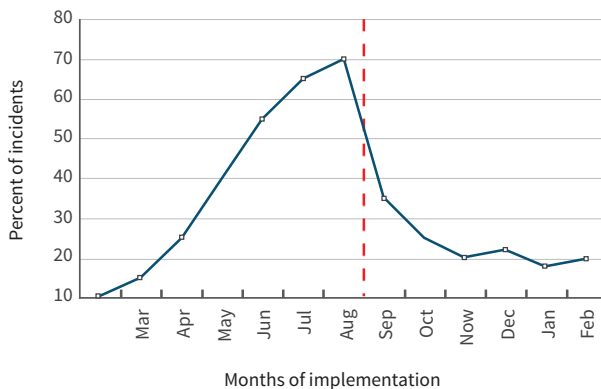
Source: HDI "What is LZS?"

10 Common Barriers to Self-service Success

While the benefits, capabilities, and LZS approach can help to ensure the success of self-help and self-service initiatives, there are a number of areas that, if ignored or given insufficient attention, can derail and potentially wreck an organization's self-service initiative.

The most-commonly quoted and sought after self-service benefits

The LZS section explained how the lack of accessible and suitable knowledge articles can be a big stumbling point, but there are other potential issues that need to be addressed in order to increase an organization's chances of self-service success. These include but are not limited to:

1. Not learning from the mistakes of failed self-service initiatives. These might be those of industry peers or previous internal attempts. While it's generally bad news that there have been far too many self-service "failures," there are at least a lot of learnings to be had. With the IT industry awash with self-service mistakes that a motivated corporate IT organization could learn from. So ensure that those involved with your self-service initiative consult with peers in other organizations, and seek out other industry best practice, to better understand what to do and what not to do.

2. The self-service initiative is treated as a technology, rather than a business, project. It's the "same old, same old" – the "let's buy a tool" approach – where technology is introduced as the "end" rather than as "the means to an end." Self-service won't deliver the required benefits – across costs, efficiency, customer experience, etc. – if employees don't use it or even if they don't use it enough. So understand what self-service success is in business terms and think "self-service capability and management" rather than just "self-service technology."

3. A lack of end user involvement. This is where end users are unintentionally, or deliberately, kept away from what should really be a business and people-change project. Extending the previous point, a big part of why technology-driven projects fail is a lack of end user and customer involvement. With the delivered self-service capability either not meeting end user needs or being too difficult for them to use. The IT organization might also fall into the trap of creating the self-service capability that THEY would want to use. It's the unfortunate result of not understanding end user wants and needs, and how they think and work.

4. The purpose, scope, and desired outcomes of self-service are misjudged. Ask "What's the purpose of self-service?" If the answer is something akin to "To implement self-service technology to allow end users to help themselves" then the IT organization in question needs to revisit the justification stage of their initiative. As the desired outcomes shouldn't be "self-service technology" or "end users helping themselves." Instead the initiative should be described and driven by a future end state that delivers a portfolio of IT and end user (and ultimately business) benefits. With its objectives identifying the issues and opportunities that need to be addressed through the introduction of self-service.

5. Insufficient planning for day-to-day operations. This is where the self-service capability, or most-likely self-service technology, is delivered by the project team without the people and processes required to make self-service an ongoing success. Whether this is to support the gradual increase in end user adoption, to continually improve existing or future self-service capabilities, or to merely manage the existing capabilities and content.

6. Not addressing people-change issues. It's the "usual suspects" for organizational change management from communication, involvement, buy-in, education, and training to more

communication and training. With self-service, unless a company has an autocratic leadership style, end users need to know "what's in it for them" before embracing the change. And, of course, if that change makes it harder for them to do their jobs, or to get what they need to do their jobs, then the change won't be embraced.

7. Self-service is viewed solely as a cost-saving replacement for telephone access. Of course self-service could be this – but only if people use it. And for people to use it, self-service has to be better and easier than using the telephone channel. Unless of course the telephone channel is removed, for some or all issue types, with end users "forced" to use self-service. Sadly, this forced approach still might not deliver the promised benefits of self-service, other than reducing the service desk's workload – and at what cost? Is IT support costing the business more under forced, and potentially inefficient, self-service? Or are end users simply just "carrying on regardless" and working around their IT issues?

8. Insufficient use of automation. Just using self-service to replace end user phone calls to the service desk is sub-optimal in terms of improving costs, speed, and quality of service. Instead, workflow and automation is where much of the workload reductions, efficiency gains, cost savings, and service improvements lie.

9. Launch "apathy." The self-service capability is made available by IT, maybe even with somewhat of a fanfare. But it's more about the technology being successfully implemented, and now being available, than about having a capability that end users want to, and do, use. It's as though the "IT project machine" has merely ticked off that the self-service technology has been delivered and they can move on to the next technology project. Not only does this approach commonly fail to reap the promised benefits of the self-service investment, it also casts a long shadow over future attempts to deliver a self-service capability – as the launch apathy is replaced by end user apathy.

10. A one-off attempt to encourage adoption. A self-service capability is a "living thing" – it will flourish or die based on continued nurturing. So organizations need to continue to involve customers, actively seek feedback, and be open to criticism. Plus, to monitor usage, to continue to improve knowledge articles, and to offer additional end-user coaching and training where needed. Finally, they need to consider, and try, different ways to increase self-service use and to improve ease of use. As they say in the UK, it's like painting the Forth Bridge.

8 Tips for Self-service Success

Delving into the practical part of implementing self-service, this section talks about how to increase your organization's chances of success with a number of other opportunities, apart from what we've already covered.

1. Invest in better knowledge management

While knowledge management is about capturing, distributing, and effectively using knowledge, it also requires cultural change to be truly effective.

Knowledge capture, distribution, and (re)use need to be embedded in business processes and in employee recognition and reward frameworks. Otherwise it will always be something that gets done in addition to, and usually after, the day job.

Technology can help here, once the people and process-based needs have been considered and addressed. And don't forget the level zero solvable approach to creating and refining knowledge articles.

2. Offer choice

Self-service isn't going to be the best solution for end users all the time.

Firstly, some IT issues require a response that's more immediate than end users can receive from self-service. Secondly, individuals have personal preferences for support access and communication channels – something that is heavily influenced by ease of use and success rates.

Thirdly, self-service might not be suitable for some roles. For example, very senior roles where self-service increases the business cost of IT support, and business critical roles where self-service could delay resolution and continued business operations.

Whatever the scenario, end users shouldn't be forced down the route of self-service when it's not appropriate, with self-service offered as just one of many available access and communication channels.

3. Support mobile access to self-service capabilities
Access to corporate mobile-app-based self-service capabilities is not as prevalent as online self-service portals. With on average only one quarter of the organizations that offer any of password reset, knowledge bases, and ticket status checking via an online self-service portal offering a similar service via a mobile app (source: HDI "Technology for Empowering End Users," 2015).

This also ties into tip number 2, in that if there's not easy mobile access to self-service capabilities then it's another reason for offering choice.

4. Recognize the difference between UI and UX
A big part of self-service success is user experience (UX). If end users find self-service capabilities intuitive and easy to use, then they will most likely use them again (and again).

So those responsible for the self-service delivery project need to differentiate between the sexy technology, with a great-looking user interface (UI), and how the end user uses and experiences the technology.

Every end user touch point should be optimized for the best possible user experience, with this equally applicable to mobile apps as it is to online self-service portals.

5. Use fit-for-purpose technology

While having the right functional capabilities "front of house" is important, the back-end non-functional capabilities are important too.

Choose a tool that's easy to configure and customize when needed. Adopt a tool that can show usage and has reporting that can show improvement. Depending on your organization's demographics you might also need to choose a tool that caters to the "Google generation" across UI, UX, mobility, and social.

6. Exploit existing corporate automation capabilities

Many of the big-ticket self-service benefits are tied into the use of workflow and automation. However, self-service automation shouldn't require the reinvention of the proverbial wheel.

In fact, the opposite is true – self-service initiatives should piggyback the corporate automation strategy, seeking out existing technologies and IT skills that could be reapplied to self-service scenarios.

For instance, the organization's existing software deployment automation could be leveraged to provide a self-service download capability.

7. Look ahead to self-service opportunities outside of IT

This isn't a case of running before you can walk but merely the high-level planning of how the organization's investment in self-service could be extended to other corporate service providers such as HR, facilities, and legal.

Such planning might help justify increased investment and make the phased delivery of certain self-service capabilities more logical. For instance, HR would benefit from a self-help knowledge base, issue logging, and chat but not password reset or download capabilities.

8. Start with a friendly pilot group

No matter how well the self-service project progresses, there will always be teething issues during testing and even at launch. So don't take a big-bang approach to launch – both in terms of what's initially offered and to whom it's offered.

Instead pilot the new self-service capabilities with a group of "friendly" end users who will understand if things don't always work first time and who will also offer up suggestions on how to improve the initial self-service capabilities.

So make the early mistakes privately rather than in public, and try to deliver one thing well rather than two things badly. A failed first self-service launch casts a long shadow over future launch attempts.
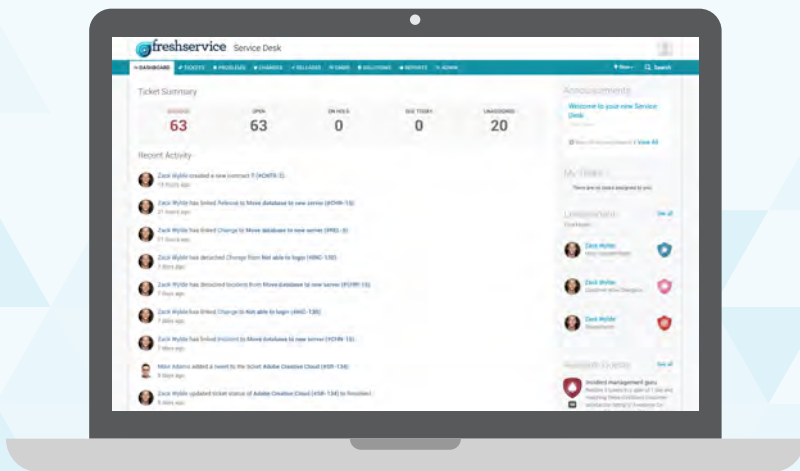
Freshservice's Ultimate Self-service Checklist

Here's what you need to know before you kickstart self-service in your organization.

☑ **Find out if you're ready:** Use the level zero solvable (LZS) approach to ensure your organization is ready for self-service.

☑ **Map your goals:** Have a clear objective that's future-driven, to implement self-service – not just to let users help themselves.

☑ **Think beyond technology:** Don't just buy a good self-service tool, think self-service capability and management.

☑ **Do your research:** Involve end-users/ customers to learn about their wants and needs before creating a self-help capability for them.

☑ **Focus on the UX:** Make it all about the end-user experience to drive adoption. The self-service portal needs to be intuitive and easy to use so it makes their jobs easier, not harder.

☑ **Make it work for everyone:** Ensure the self-service portal is customizable for use across departments. Make the best of the investment.

☑ **Go mobile:** Give rise to self-service on-the-go. Offer easy and accessible support to your end users.

☑ **Continue to improve:** Constantly optimize the self-service capabilities and keep up with your end users' needs.

☑ **Offer choice:** Self-service shouldn't be the only choice of help you're providing to users. Other communication channels must be open for access.

About Freshservice

Freshservice is a cloud-based service desk and IT service management solution with over 7500 customers worldwide. Designed using ITIL best practices, it helps organizations simplify its support processes, focus on exceptional service delivery and customer satisfaction with features like incident management, self-service, gamification, asset management, and integrations with third-party apps.

Customers choose Freshservice for its intuitive UI, ease of use, speed of setup, customer service, and affordability. Freshservice is built on the proven Freshdesk platform, whose flagship customer service offering supports more 80,000 customers worldwide.

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