GETTING SELF-SERVICE RIGHT
Masterclass

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Coverage

1	Scene setting (and flipcharting)
2	Common issues plus avoidance tips
3	Potential post-success issues and what to do
4	Key takeaways

Group questions

1 Already **have** a self-service capability?

2 Are **happy** with it?

3 Think that they can **improve**?

4 **Plan** to offer self-service?

5 Think it will be a **success**?

Promised self-service benefits include:

1. Cost savings*
2. Improved availability and efficiency (for IT and end users)
3. Easing service desk workloads
4. Better prioritisation of issues and requests (vs. the FCR "free-for-all")
5. Increased end-user productivity
6. Improved perception of IT
7. **Delivering an improved "customer experience"**

People change
&
CONSUMERISATION!

Many have failed to understand that consumerisation isn't just about devices, apps, and personal cloud services

"Increased employee expectations of corporate services based on their personal-life experiences"

The two sides of self-service adoption

HIGH adoption
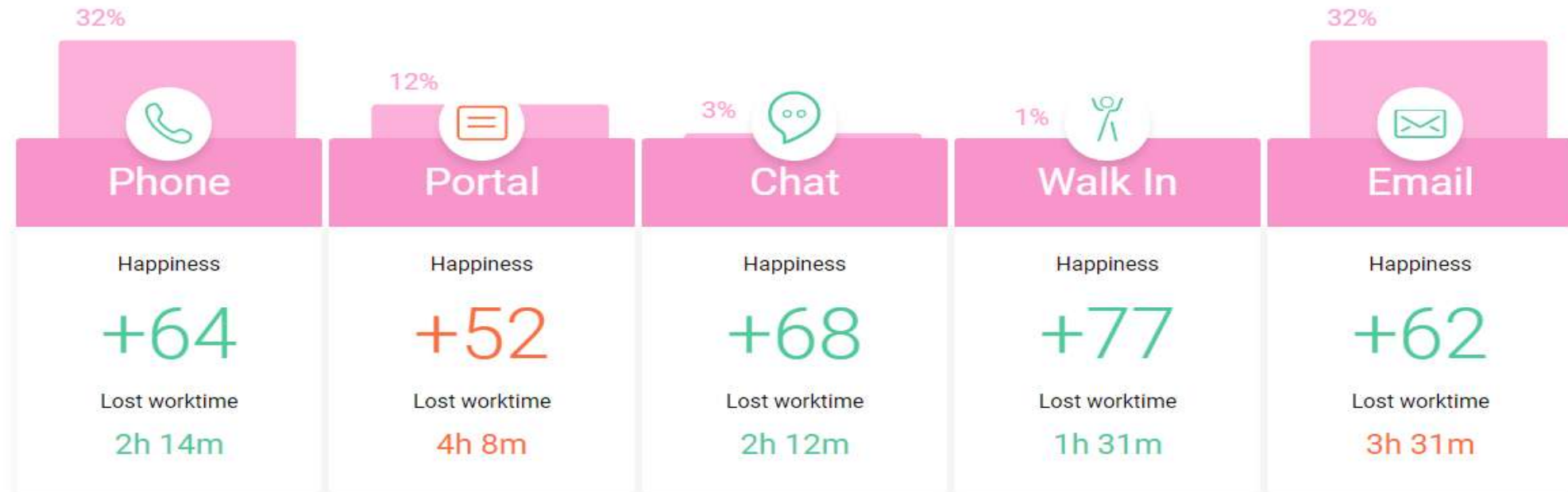(investment in technology)

LOW adoption
(usage by employees)

Happiness with self-service

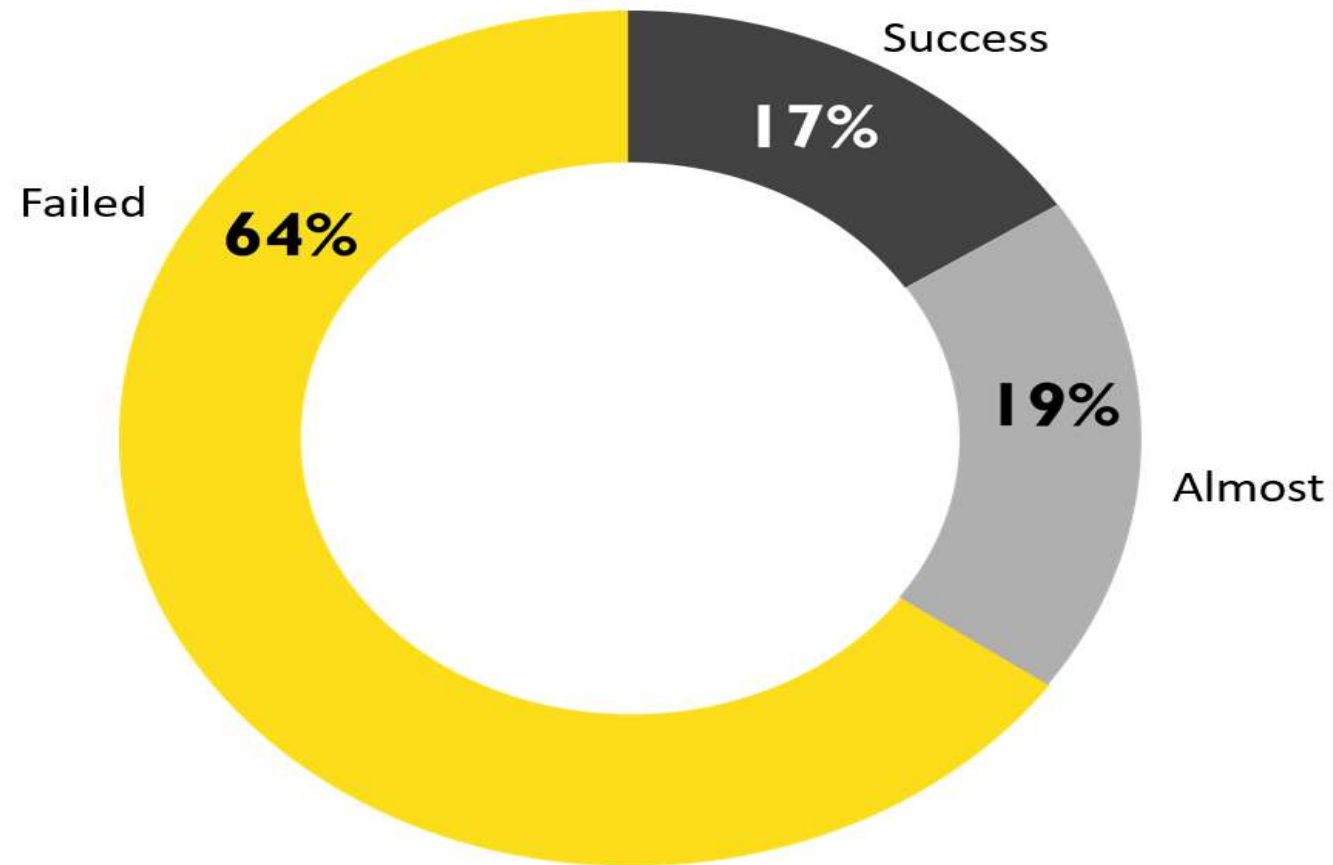**Channels** - It matters how people start their process.

2017 still seems quite traditional when looking at the channel distribution.

32%	12%	3%	1%	32%
Phone	**Portal**	**Chat**	**Walk In**	**Email**
Happiness	Happiness	Happiness	Happiness	Happiness
+64	+52	+68	+77	+62
Lost worktime	Lost worktime	Lost worktime	Lost worktime	Lost worktime
2h 14m	4h 8m	2h 12m	1h 31m	3h 31m

HappySignals

Self-service benefits increase the more self-service is used.

~ 10% adoption won't deliver the expected benefits

ITSM. tools

How successful has self-service been?

Success 17%

Almost 19%

Failed 64%

Powered by

SDI intelligence

During 2016, which of the following do you expect to see?

2015 Responses

Greater focus on the customer (end-user) experience — 69% **NEW**
Greater use of self-service and self-help — 67%
Increase demand for business intelligence (i.e. the use of big data) — 47% **NEW-ish**
Increased support for personal mobile devices — 40%
Increase in demand for non-IT business services — 35% **NEW**
Adoptions of ITIL's continual service improvement practices — 34%
Increased support for personal devices — 33%
Increase in the proportion of shared service operations — 30%
More peer to peer support via internal communications — 26%
Greater use of social media support — 21%
The use of gamification on the service desk — 14%
Generally things will stay the same — 8%
I have no idea what the future holds for my service desk — 6%
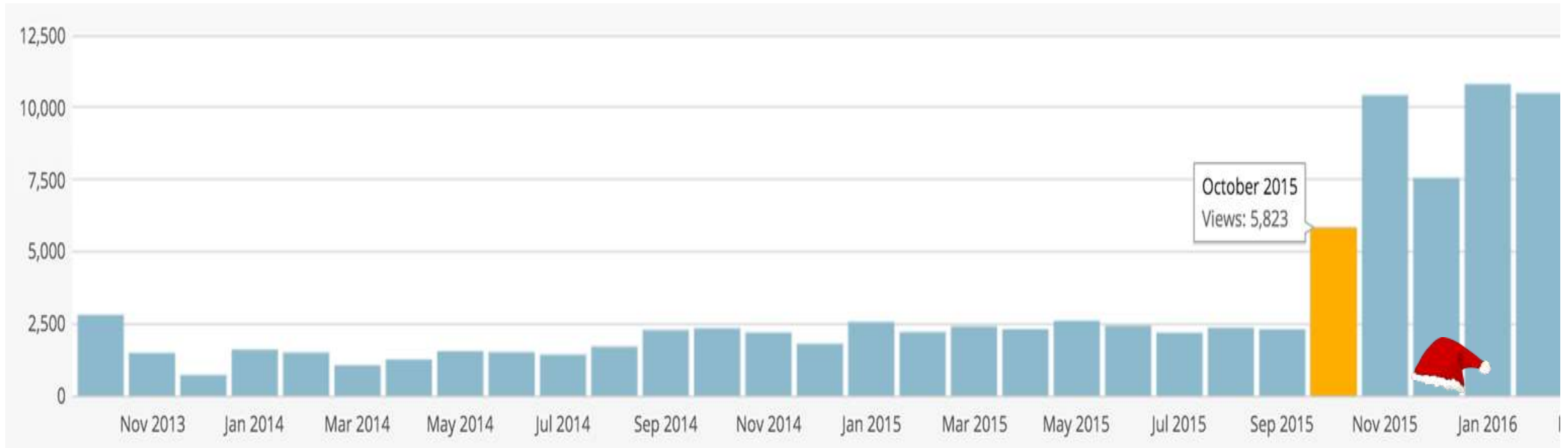Other — 3%

2012 Responses

Rank	Response
1	Provide support/more support for mobile devices (BYOD)
2	More use of self-service
3	An increase in business service provision
4	Increased demand for business metrics and reporting
5	Service desks using social media more
6	Use more self-help
7	No big changes/things will stay the same

But self-service success is possible

Source: Freshservice

What are the biggest **barriers** to self-service success (again)?

So many barriers to self-service success

1. Not learning from the mistakes of failed self-service initiatives

2. The self-service initiative is treated as a technology, rather than a business, project

3. A lack of end user involvement

So many barriers to self-service success

4. The purpose, scope, and desired outcomes of self-service are misjudged

5. Insufficient planning for day-to-day operations, especially knowledge management

6. Not addressing people-change issues

So many barriers to self-service success

7. Self-service is viewed solely as a cost-saving replacement for telephone access

8. Insufficient use of automation

9. Launch "apathy"

10. A one-off attempt to encourage adoption

1. Behavioral change is needed

Managing people change

organizational change management (OCM)

Organizational change management (OCM) is a framework for managing the effect of new business processes, changes in organizational structure or cultural changes within an enterprise. Simply put, OCM addresses the people side of change management.

http://searchcio.techtarget.com/definition/organizational-change-management-OCM

Read up and seek expert help
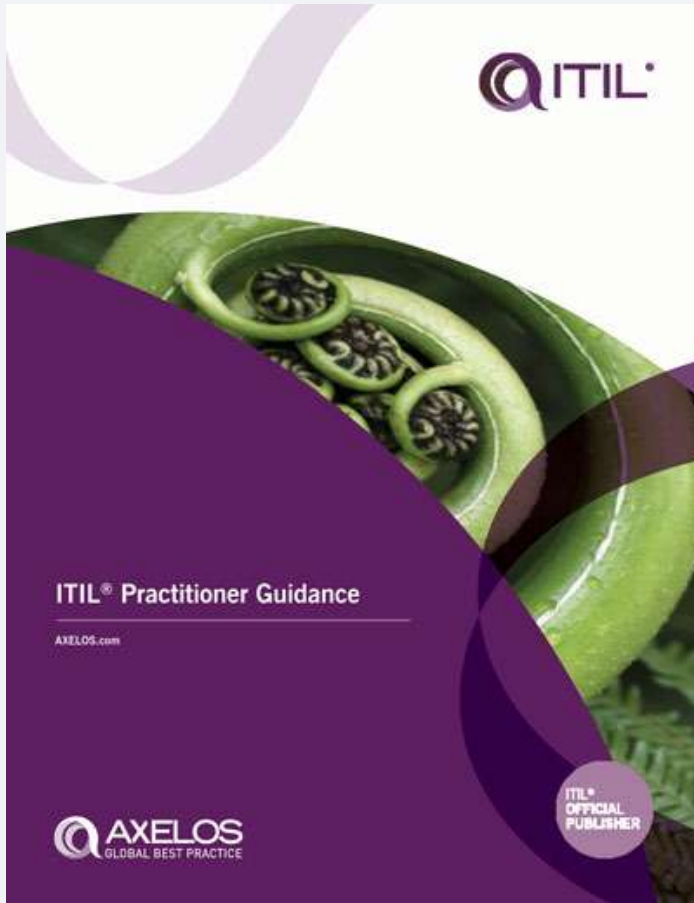
- Address potential people-change issues, and the associated likelihood of resistance, early

- Start with the "what's in it for me" and demonstrate the value of self-service other existing channels

- End users need to know why things have changed (the business benefits), how the change will help them (the personal benefits), and what they need to do to benefit from self-service

- **BAD ASSUMPTION:** that because employees are happy to use self-service in their personal lives, the same is true at work

Knowledge management tips

1. Think of knowledge management as a capability not a process

2. Realise that knowledge management is about people and engendering the right behaviours

3. Recognise that the link between people and what they know is very complicated

People and what they know

- "Knowledge is volunteered, never conscripted"
- "We only know what we know when we need to know it"
- "We know more than we can say, we say more than we can write down"
- "The way we know things is not the way we say we know them"
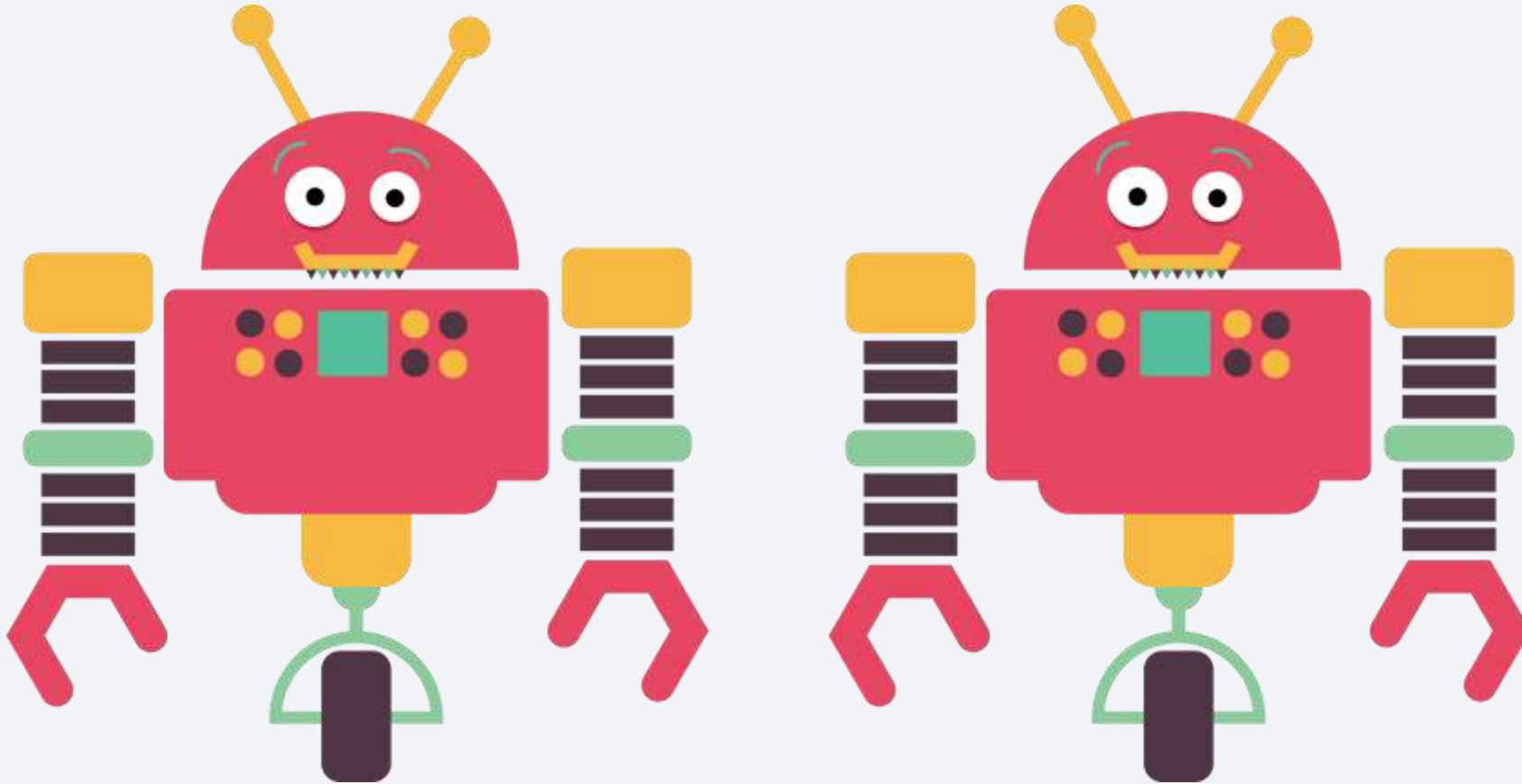
Knowledge management tips

4. Make knowledge management a business-as-usual activity and be sure to motivate people

5. Ensure that you have the right technology breadth to support the people and processes

6. Look beyond traditional ITSM-tool knowledge management capabilities

Knowledge management tips

7. Consider employing a trusted knowledge management methodology, e.g. KCS

8. Look at using the Level Zero Solvable (LZS) technique for self-service/self-help
https://www.thinkhdi.com/~/media/HDICorp/Files/Library-Archive/Insider%20Articles/WhatIsLZS.pdf

9. Look to leverage machine learning…

3. Exploit automation

Automation benefits

1. Increased speed of execution
2. Improved customer experience
3. Cost reductions
4. Reduced human intervention
5. Reduced "human error"
6. Increased task adaptability
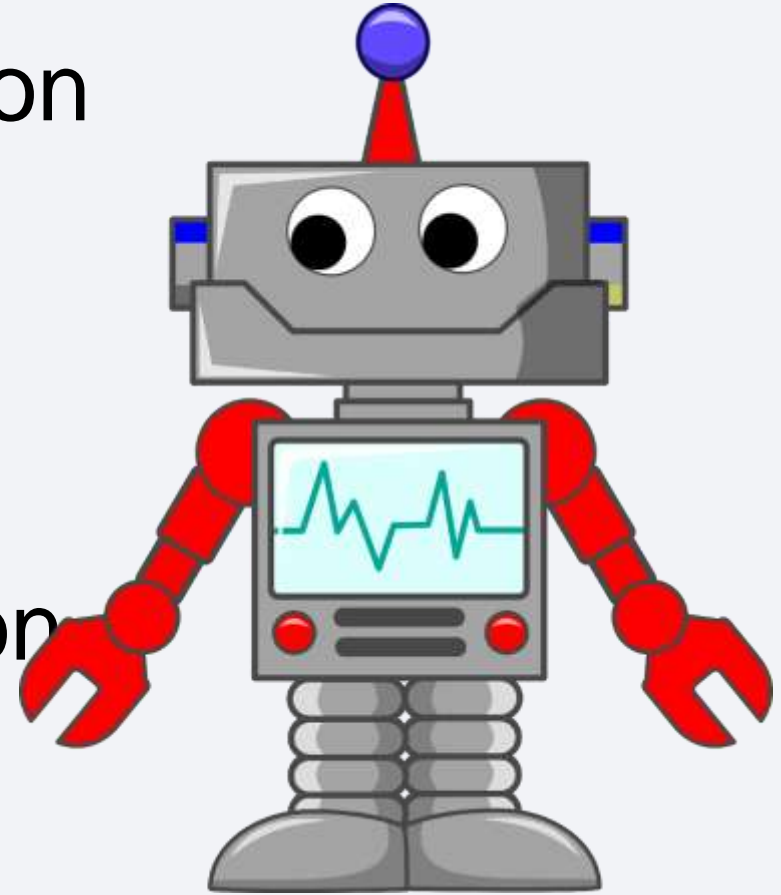
Simple self-service automation

1. Password reset
2. Approved software downloads
3. Standard changes
4. Pre-approved third-party purchases
5. Auto-set-up, e.g. email
6. Cloud provisioning
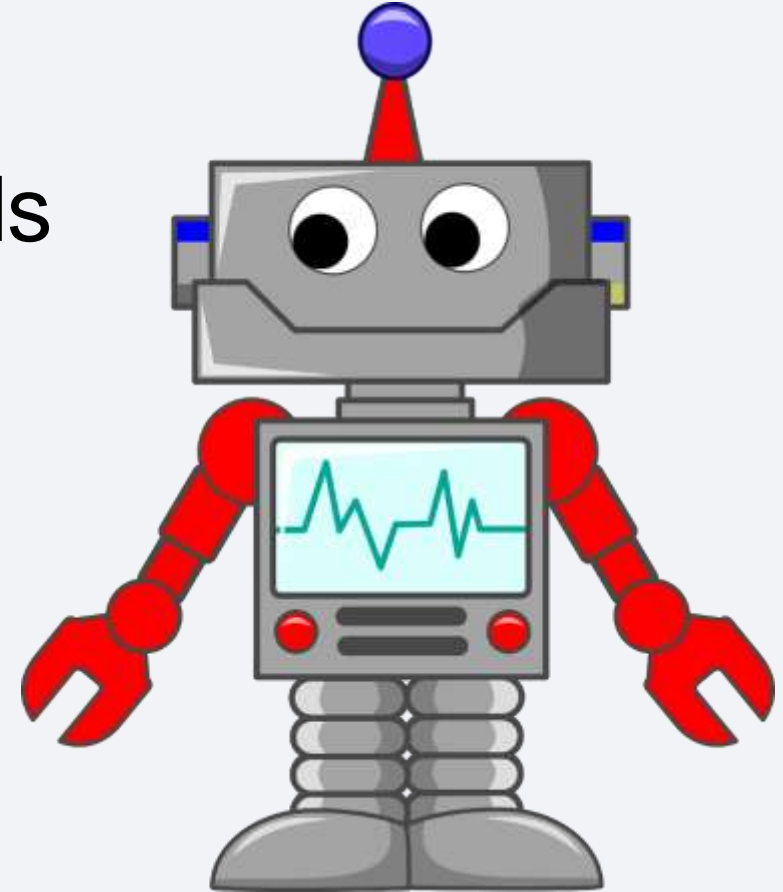
Improving self-help
WITH MACHINE LEARNING

1. **Improved search capabilities** – "intelligent search"
2. **Providing recommendations** – such as end users already get with Amazon and Netflix in their personal lives
3. **Intelligent autoresponders** – tickets are actioned and closed by the technology without human involvement
4. **Identifying and filling knowledge gaps** – the identification of knowledge-article gaps or the conversion of documented ticket resolutions into knowledge

AXELOS 2030 survey

✓ **Automation** – 89% think that an increase in automation will take over the repetitive tasks of IT, … more time for service managers to focus on delivering more value

✓ **AI/machine learning** – 77% said they believed these trends would have a profound impact on the IT workforce, liberating ITSM professionals from routine tasks

Source: AXELOS, "The IT Service Management Professional i

Plan for the adverse impact of success

What happens when your company gets good at self-service?

The downside of self-service success

1. Changes to the incident and service request profile mixes

2. Service desk agents will be a premium resource and harder to recruit/retain

The downside of self-service success

3. Metrics and targets will become skewed

4. Will business operations be adversely impacted by "failed" self-help?

The downside of self-service success

5. Will self-service success lower business perceptions of IT?

6. Will customer relationships be strained or even lost?

Key takeaways

1	Self-service is about offering new capabilities more than it is implementing new technology
2	There are many barriers to self-service success; so be prepared to research, consider, address, and traverse them
3	Don't underestimate the power and threat of consumerisation (and now CX)
4	Automation and KM are key to upping self-service use and then reaping the potential benefits
5	Plan for the adverse impact of self-service success

THANK YOU

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