Use a Better Customer Experience to Drive Self-Service Adoption

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For the last few years, self-service has been viewed as the "silver bullet" for IT departments – providing the ability to deflect calls from the service desk, increase efficiency, reduce costs, and better meet end user, or customer, expectations of modern IT support.

It sounds great, but if you read that first sentence again, does it not smack of IT self-service being focused on IT first and the customer second? It's one of the main reasons why so many IT departments have struggled to reap the promised benefits of self-service – because an insufficient volume of employees want to use and reuse these new capabilities. The reality is that IT self-service is too often killed by the failure to provide a good enough, let alone great, customer experience.

This eBook explains the common mistakes made in introducing IT self-service capabilities and offers advice on how to avoid them. And it's not just applicable to greenfield capabilities, it's also relevant to IT departments seeking to increase their current levels of employee adoption.

HOW THE IT INDUSTRY IS MISSING OUT ON THE BENEFITS OF SELF-SERVICE

Research by the Service Desk Institute (SDI) shows that only 17% of organizations think that they've received the promised benefits from their investments in self-service. To back this up, employee self-service usage statistics from both HappySignals and MetricNet have the channel at circa 12% of ticket volumes, and still dwarfed by the more traditional IT service desk access and communication channels of telephone and email. And this is despite over 80% of both US and UK organizations having already invested in some form of self-service technology.

Thus, the promised benefits of self-service – such as cost savings, easing service desk workloads, improved service desk availability and efficiency, and increased employee productivity – aren't realized because the expected, and significant, level of self-service use isn't hit. Why is this so? It's because employees haven't been convinced to use and keep using the new self-service capability – most likely because it's harder to use than the existing telephone and email channels and it ultimately doesn't deliver a better customer experience.

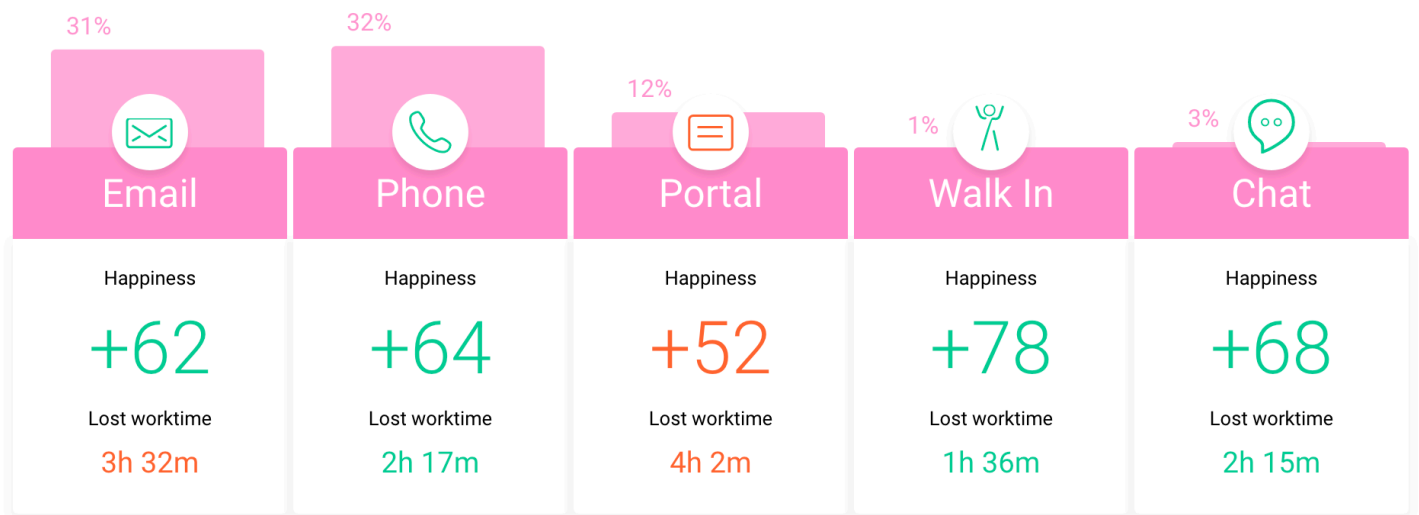## YES, CUSTOMER EXPERIENCE IS RELEVANT TO THE PEOPLE IT CALLS "END USERS"

Like it or not, consumerization has happened. Employees have brought their personal-life experiences and expectations into the workplace and now expect more from corporate service providers such as IT, HR, and facilities. Importantly, it's not just the "consumerization of IT" – with the use of personal devices, apps, and cloud services – it's actually the "consumerization of service" which also relates to expectations of service delivery, customer service, support, and the overall customer experience.

Thus, IT self-service capabilities, along with everything else IT does, are being compared to exemplar consumer-world equivalents such as Amazon, and failing to meet the grade. Not convinced? Please read on.

WHAT EMPLOYEES THINK OF IT SELF-SERVICE

The diagram below shows HappySignals employee experience management data from May 2017:

HappySignals employee experience data

	Email	Phone	Portal	Walk In	Chat
	31%	32%	12%	1%	3%
Happiness	+62	+64	+52	+78	+68
Lost worktime	3h 32m	2h 17m	4h 2m	1h 36m	2h 15m

Source: http://benchmark.happysignals.com/benchmarks (19 May 2017)

What this global data, based on circa 100,000 employee feedbacks received in the last six months, shows is that:

- The self-service channel offers the lowest level of employee happiness, and by a long way, a stark contrast to employees using self-service in their personal lives and IT's ambition to use self-service to deliver a better customer experience
- More time is lost, by the employee, with self-service than any other channel.

Ultimately, IT departments are failing to meet employee expectations of what self-service needs to be; and the assumption, if made, that employees will use IT self-service just because they use self-service in their personal lives doesn't stand up.

UPPING THE LEVEL OF SELF-SERVICE SUCCESS THROUGH BETTER CUSTOMER EXPERIENCE

The bottom line for IT departments is that they haven't yet delivered a self-service capability that employees want to use and reuse. Here's four of the most common reasons why:

1. The self-service initiative is viewed as a technology project, and then suffers from a lack of employee (end user) involvement
2. Self-service is seen solely as a cost-saving replacement for telephone access
3. People-change issues, including resistance to change, are not understood and addressed
4. There's insufficient use of both knowledge management and automation, which should be providing the backbone for both cost savings and greater speed of delivery, the latter of which would help drive customer experience improvements.

In order to avoid these and other common mistakes, and to drive higher employee self-service adoption levels and the benefits this would reap, IT departments need to focus on four key aspects of how a self-service capability is designed, built, and used. They ultimately need to focus more on the employee, or customer, experience.

1. TREAT SELF-SERVICE AS A BUSINESS PROJECT

Recognize from the outset that self-service isn't about the implementation of new technology. Instead self-service is a business project that changes the way in which employees work, in the pursuit of better business outcomes. And, while there will be cost savings to be had through the use of technology, the self-service initiative needs to be built around end users, i.e. employees.

Be warned though, while IT staff are employees (and consumers in their personal lives), they're not necessarily indicative of the organization as a whole. And using their inputs alone will most likely result in a self-service capability that the IT department would want to use rather than something that's suitable for all employees.

So, involve the real end users from the get-go; and make those involved a reflection of the whole organization across different role types, different departments, different locations, different levels of seniority, and different levels of IT proficiency. Try to cover all the bases in terms of how employees want and need to work, and what terms such as "intuitiveness" and "ease of use" really mean to them.

Ultimately, you'll be creating a customer-centric self-service and self-help capability that recognizes what's important in delivering a better customer experience.

2. FOCUS ON A BETTER CUSTOMER EXPERIENCE OVER COST SAVINGS

With the never-ending pressures on IT service desks to improve efficiency and reduce costs, it's unsurprising that self-service is viewed as a great way in which to reduce costs even further. However, these savings, and a positive return on investment (ROI), will only be realized if there's sufficient employee usage.

It's a little chicken-and-egg, in that there has to be a sufficiently good customer experience and outcome for employees to use the self-service capability. And thus, neglecting this – perhaps with an overly-complex or "cheap and cheerful" capability – will not drive sufficient usage to generate any significant savings. Whereas, the better the customer experience and outcomes, the more self-service will get used and the more money the service desk can hope to save.

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So, make financial savings a secondary objective, realizing that there needs to be a sufficient volume of self-service use to generate any meaningful benefits.

3. USE ORGANIZATIONAL CHANGE MANAGEMENT TECHNIQUES TO FACILITATE THE TRANSITION

Remember that the people side of self-service is more about changing behaviors and the way of working than it is training employees to use a new technology. Employees not only need to know the "how" of self-service, they also need to know the "why." Sadly, a Field of Dreams "build it and they will come" approach won't work – history has shown us this – and so an investment in a proven organizational change management (OCM) methodology is required. This includes the minimization of the resistance to change that manifests from people's sense of the unknown and the perception of imminent peril.

The AXELOS ITIL Practitioner Guidance is a great source of organizational change management information but, while it's good to be informed of what's needed, it would also be wise to employ the services of either an internal or external expert who's proficient in its real-world use. Ultimately, employees need to buy into, and be "brought along with," the change. From selling the change – explaining the "What's in it for me?" – through providing frequent and consistent communications in respect of what's happening (and will happen), to providing the required level of education and training for the self-service capability to be used effectively.

The bottom line is that employees need to understand why self-service is better for them and the business, and for it to be an easier and better experience than the alternative IT support access and communication channels.

4. INVEST SUFFICIENTLY IN KNOWLEDGE MANAGEMENT AND AUTOMATION

IT self-service capabilities need to be underpinned by an effective knowledge management capability – it's the fuel that powers the self-help capability. But knowledge management not only helps employees directly, by providing immediate answers as and when they are needed, it also serves as what's probably the most effective self-service "stickiness" mechanism. It's this level of immediacy, versus logging a self-service ticket and waiting (and waiting), that helps to get employees using and reusing the self-service capability.

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However, a common mistake is to launch a self-service capability with a knowledge base that's not yet fit for purpose. Here, a readiness-assessment technique called Level Zero Solvable (LZS) – the percentage of service desk tickets that could have instead been resolved by the employee via self-help – can be employed to understand the chances of self-service success by predicting the level of knowledge base success.

Automation offers a similar level of immediacy to the resolution of incidents (where the employee can't self-enact the required action) and to the provisioning of service requests. And while the first automation benefit thought of is usually cost savings, thanks to the removal of human effort from any given task, the real benefit for self-service is the increased speed of delivery which in turn makes for a better customer experience. Both of which will positively influence employees to return to the self-service capability and possibly to positively promote it to peers.

Without suitable automation, a self-service capability will struggle to win the hearts and minds of employees, i.e. when it's just a (hopefully) pretty storefront, issue capture mechanism, and shopping basket. Why? Because this form of self-service capability is slower than calling up the service desk, and maybe even slower than emailing too. Employees get immediacy in their personal lives and so they now expect it at work.

Ultimately, self-service without the automation of resolution and provisioning, and self-help without knowledge enablement, will deliver a slower and poorer customer experience.

Self-service success and the associated benefits are there to be had, but be warned – without a great customer experience, and one that's better than simply calling the service desk, employees will be loath to use an IT self-service capability. So focus on the above four key aspects of how a self-service capability is designed, built, and used to increase your organization's chances of winning with self-service.