



Self Service for ITSM 101

 freshservice
by freshworks

Introduction to Self Service

It was 1937 and the owners of the Piggly Wiggly grocery store in Oklahoma, unassumingly introduced something that would revolutionise consumerism for years to come: the world's first shopping cart. The disgruntled lines got shorter, the cost of operations shrunk and the profits got larger. The results were undeniable - helping customers to help themselves was the easiest way to retain them. Before you knew it, ATMs, vending machines, gasoline filling stations and parking meters blossomed in every corner.

However, the power of self service didn't quite reach the spectacular proportions of today until the eCommerce boom. Suddenly, a purchase didn't even require a drive to the supermarket, a cashier, or even real paper money. All that was required to make a sale, was a customer who wanted to shop and a usable interface. But a customer still needed customer support. And the principles of self service were a natural fit here.

Self service still remains the sure fire way to deliver outstanding IT support and meet growing demands within the organisation. Especially when every incident and request that is raised for you to resolve, costs you time, money and immeasurable effort. When you need to alleviate the load on your service desk and still manage to keep your customers happy - establishing seamless self service processes in your service desk is the natural solution.

And that's exactly what this handbook aims to help you with. Read on, for the 101 on designing, deploying and sustaining a successful ITSM self service portal and the perks that come along with it.

01. Design

The first thing to take into account when you're designing self service processes is to define what you want to achieve using self service.

And the way to get started with that is KYC - Know Your Customer. It's simple enough - you can't design something for people if you don't know what they want in the first place. Especially when your customers could be anyone, from an instagram shooting, constantly tweeting 20 year old to a power tie wearing, Blackberry toting middle aged executive - rest assured, their perceptions of how self service in IT support should be executed, will be wildly different.

Every organisation has a diverse workforce, culture and requirements. Understanding these differences will be instrumental for you to ascertain and define the various touch points for your self service portal. A browser interface is obviously the most basic place to start and the easiest to implement - with chat and phone portals as an added advantage. If a good chunk of your workforce is mobile, apps and a mobile optimized self service portal would be a no brainer. However, on the flipside, for a predominantly non mobile environment, designing and deploying a mobile self service portal, would not exactly be a priority.

QUICK TIP

This would be a good time to revisit marketing basics - the 4Cs - consumer, cost, communication, convenience. Understanding these criteria will not only help you budget and design the perfect self service processes, but will also ensure that the processes are actually put to use by your customers and shave a sizeable load off your service desk.

02. Deploy

Once your self service processes have been designed, think of them as just another product or service that needs to be launched and marketed the right way. Extending the same analogy, if you deploy self service and expect people to unquestioningly adopt it with no persuasion, you might end up a little disappointed.

Create a concrete launch plan for your new self-service processes. Employ newsletters, posters, user portals and forums - anyway you can get the word out to your users. The goal should be to educate your users about the new developments, establish the value delivered by the new processes and most importantly provide your users with the ability to explore and use the new processes with minimal assistance.

QUICK TIP

Before deployment, it would be a good idea to try out your new self service processes on an early adopter user group. Nothing can help you understand the strengths and weaknesses of your product and preemptively fix problems, like some informed, constructive feedback.

03. Sustain

You've got your self service portal and processes out in the world now. They've been perfectly designed to meet every requirement your users might face. You've gotten the word out and you've made sure that using the portal is a breeze for your users. But here's the thing. You're still not quite done. To ensure that your processes are sustained over time, you're going to need a little more legwork than that. Most

successful service management projects are successful precisely because they go that extra mile. You can't afford to merely deploy and forget.

The shorthand to ensure sustainability are the three E's: Engage, Evaluate and Evolve.

Once you've deployed new processes, social IT is your new best friend. Engage users in meaningful conversation through your internal communities and social networks. Utilize newsletters and forums to update and broadcast information that can keep your users involved. Engaged users are the first step on the road to permanence. Once you've got those engaged users, look around for those essential bits of early feedback. That's how you start evaluating where exactly you fall short and begin improving upon these problem areas. This process of soliciting and collecting feedback never quite ends because your service desk is about the journey and not the destination. There's no end to the implementation itself and there's always room for improvement. Every process can and should be continuously reviewed and updated. This continual improvement is the only way to ensure that your service desk is always evolving and stays relevant.

QUICK TIP

Positive or negative - even when it's all just one long row of complaints - feedback is instrumental in sustaining your service desk. In fact, it's only when you're not getting any feedback that you should start getting worried. That's the warning sign that you've just lost some engaged users

04. Measure and improve

Running your service desk is a numbers game more than anything. Identifying and studying the right metrics can mean all the difference. And when you're looking for the relevant data, you have to look no further. A self service portal offers uncountable ways to measure and analyze the organization from an IT perspective.

Key insights about your service desk can be inferred merely by a closer look at the ways in which your users interact with the portal. For example, just a little investigation into the most requested CIs in your service catalog could help you bridge the crucial demand-supply gap and even plan ahead financially. A look at the most searched for knowledge base articles could help you understand which problems most frequently plague your users.

QUICK TIP

Identify pages that users visit the most through analytics. Google Analytics is a great free tool to get a plethora of amazing insights if you use a cloud ITSM software - especially if the software tightly integrates with Google Analytics.

05. Cross Sell

In a large organisation, many of your users, especially the new hires, might not even be aware of the services they are entitled to. This means that they usually end up finding a workaround on their own, resulting in poor business efficiency or sometimes even facilitating shadow IT. And when you want to fix these miscommunication issues, the self service portal is one of the best places to start.

When you tap its full potential, your self service portal can perform an abundance of functions in your organisation. You can use it to make announcements and inform users of the exact services they are eligible to avail if they want to. Added to this, it is your responsibility to demonstrate the value of the self service portal to the non - IT areas of your organisation - such as HR, Finance and Sales - and encourage them to utilize it for showcasing and delivering their own services.

A service catalog is ideal when it starts to function more like an online shopping website. So to take a page out of e-commerce vendors, you could boost the functionality and utility of your service catalog by cross selling - a.k.a ' the people who bought this also bought this' strategy. When a user, say your UI designer, is requesting a new computer, he probably also requires the latest version of Photo-shop and some additional storage. Auto-suggesting these options is a great way of educating users about all the services they're entitled to, so they can capitalise on all the resources available to them and achieve better results.

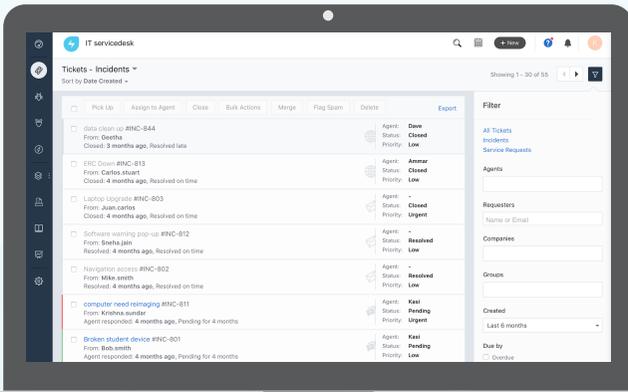
Conclusion

The best IT support happens when your customers are empowered to solve problems on their own. This reduces load on the service desk, cuts costs and exponentially increases service desk efficiency. However, the same attributes that make self service so invaluable, can just as easily backfire. For instance, if your self service portal is inadequately designed without taking customer requirements into account or if the self service processes are unstandardised or inconsistent, this might end up jeopardising exactly what you set out to achieve. Streamlining the design, deployment, and long term sustainability of your self service processes is the key step in making all the difference.

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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