

Self-Service: An In Depth Look at Making it Work



"elevating service excellence"

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Agenda

- Introductions
- What is an ITIL Service Desk?
- What is Self-Service?
- Critical Success Factors
- Common Pitfalls
- Ask Yourself...
- Questions

Sources: ITIL® material by the Office of Government Commerce, the Stationary Office,
and the IT Service Management Forum, ITSMF Ltd

Introductions

Background:

Voice Self-Service Design for nearly 10 years

CRM Solutions for Fortune 500 companies

MBA – Technology Management

Global Deployment Experience

Passion for Enabling Self-Service

Introductions

You?

- Name
- Job Role/Function
- Does your company offer Self-Service?
- What question(s) can I answer for you today?



-Insanity-

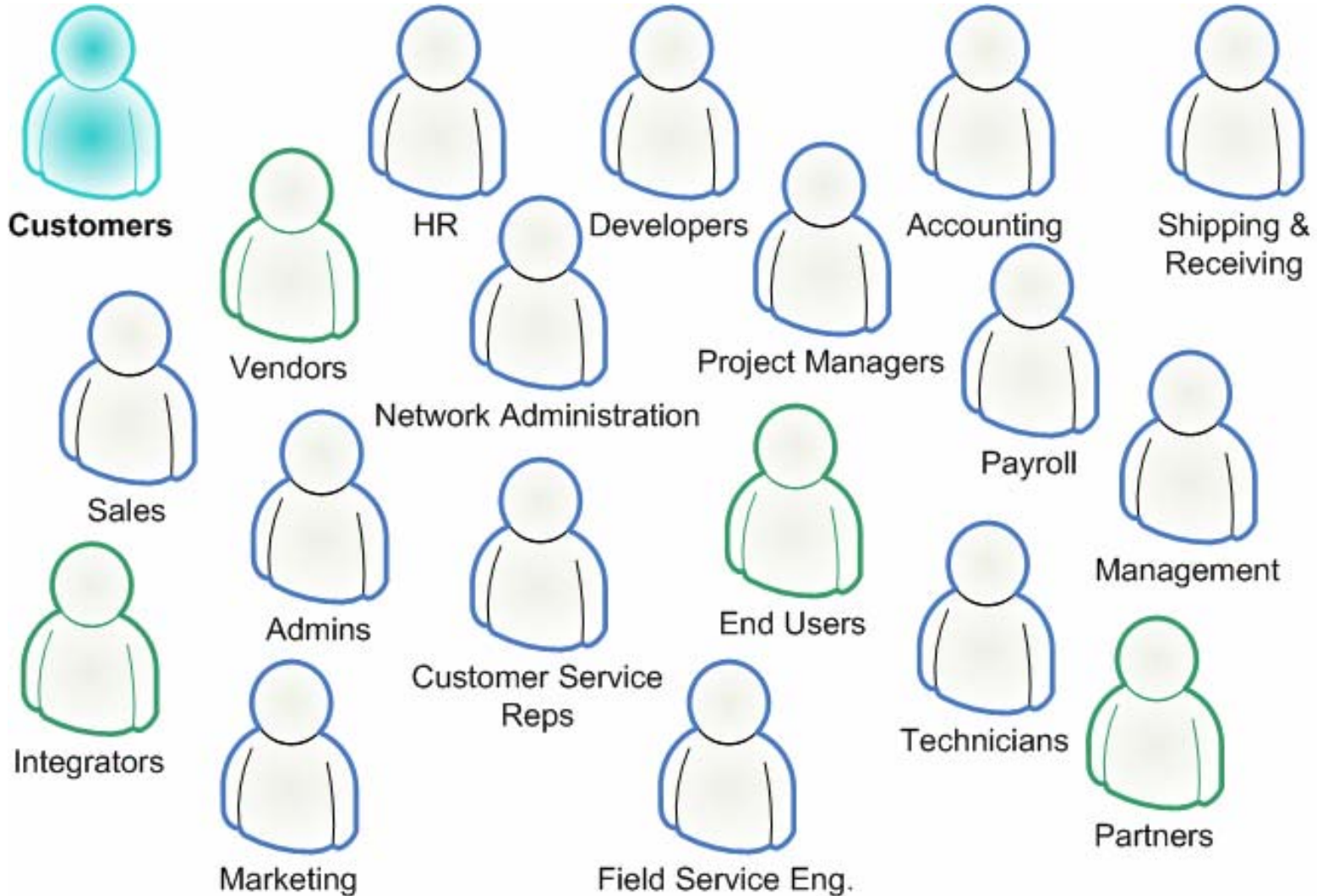
"Doing things the way we've always done them, yet expecting different results."

Deming

What is an ITIL Service Desk?

- Single point of contact between service providers and Users
- Focal Point for reporting Incidents and making service requests
- Keeps Users informed of service events, actions and opportunities
- Is in the Firing Line of any impact on the SLA's

Who are your Users?



What is Self-Service?

- Customers determine the point of entry
- Customers have direct access to support information and knowledge
- Customers are able to manage support transactions for themselves

What is Self-Service?

- Password Reset Example
 - Service Desk requires use of Web
 - Website requires Valid username
 - Ticketing software requires Username/Password to login

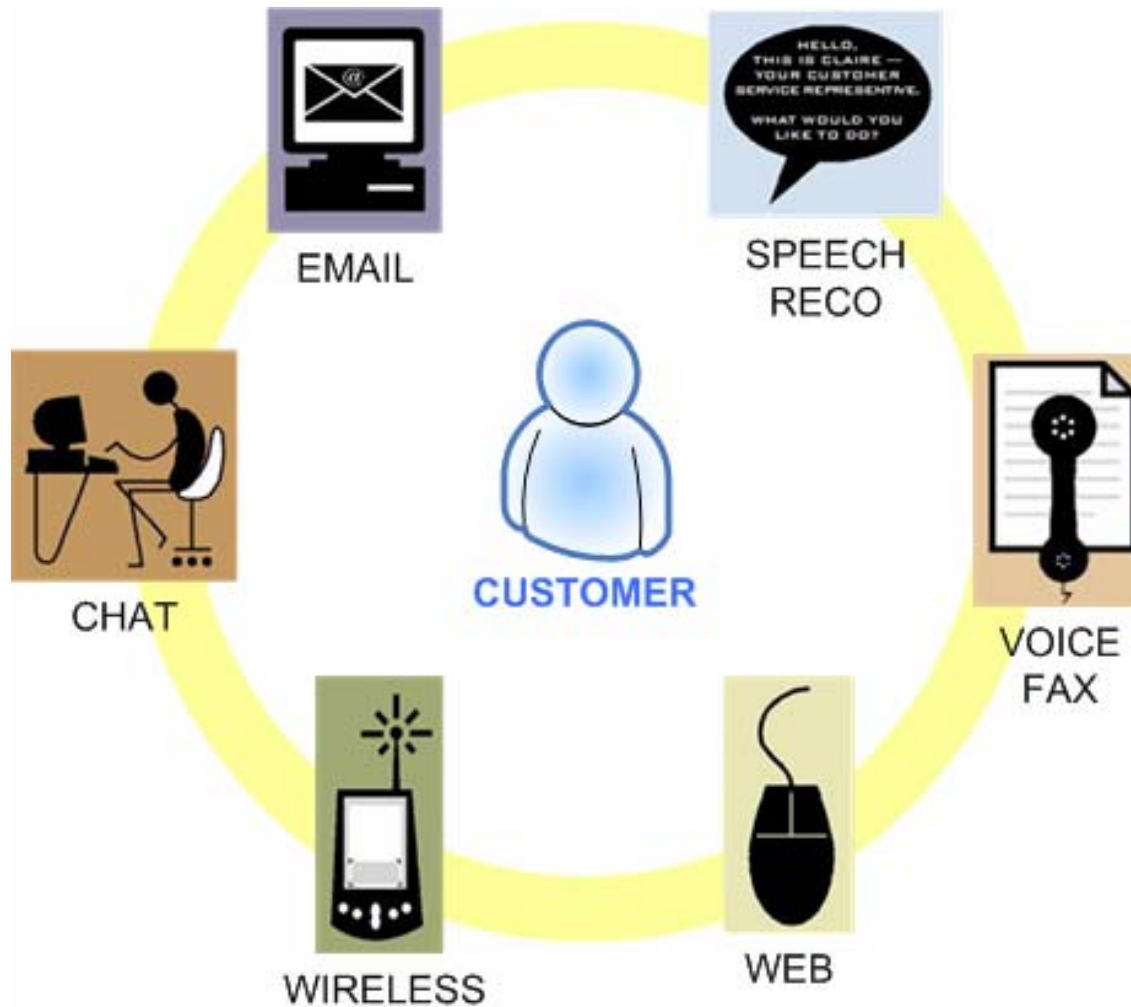
Ask “How much did this experience cost the company?”

Statistics - HDI 2003 Survey Data

- On average it costs \$28.19 for one transaction with the Service Desk versus \$8.25 per transaction for Self-Service
- 14.8% of traffic into a Service Desk is for Password Resets
- **OPPORTUNITY!!!!** Today, only 3.5% of incidents are resolved using Self-Service

Ask “How much is this costing my company?”

Self-Service Enablers

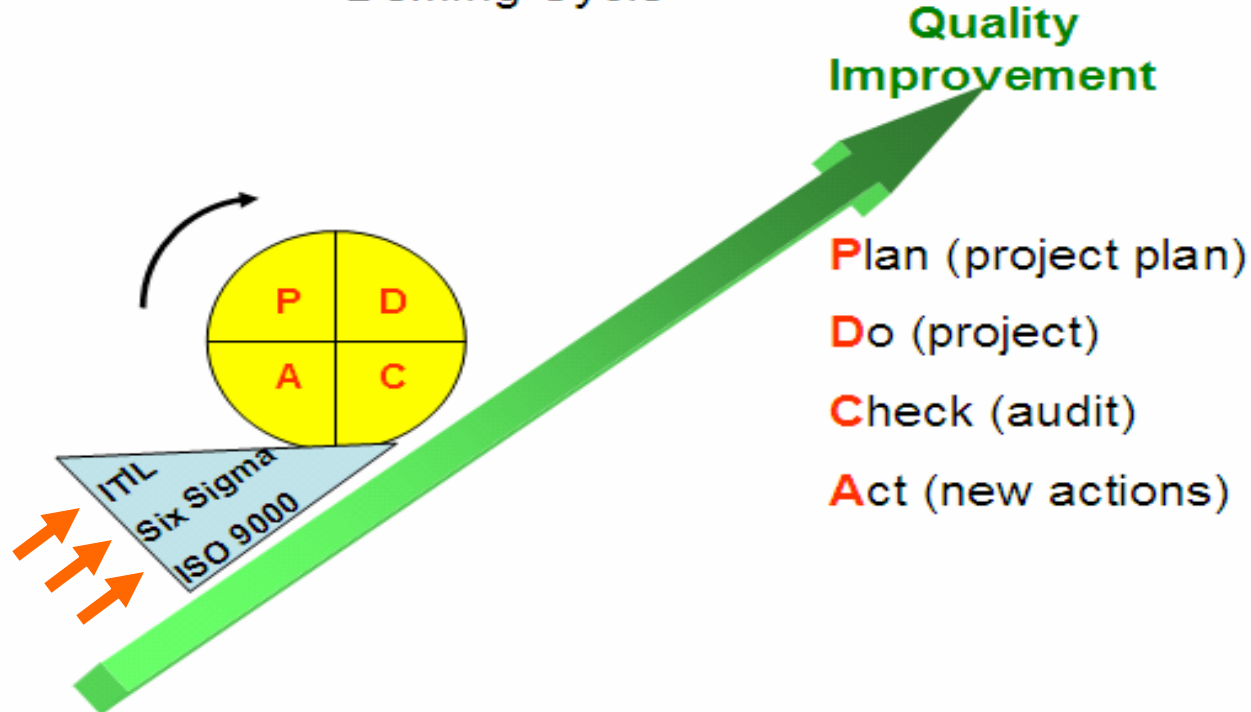


Self-Service

“Communicate with the customers the way they want to communicate with you.”

Self-Service

Continuous Quality Improvement Deming Cycle



Critical Success Factors

- **Management Commitment**
 - Any initiative that entails change within an organization requires management support and commitment to execute the initiative.

“All for One, One for All!!”

Common Pitfall

- **Management Commitment Evaporates**

“Adult Attention Deficit Disorder”

Ask “How can we keep management engaged in the process?”

Critical Success Factors

- **Business metrics are collected and used**
 - Monitor the effectiveness of services provided
 - Must know what services are being requested, how often and why

“Better than what?”

Common Pitfalls

- **Business metrics are collected and overwhelm management**

Ask “What metrics are meaningful to management?”

Common Pitfalls

- **Business changed, Systems changed, the Metrics didn't**

Ask “Are metrics regularly reviewed and updated to reflect business objectives?”

Critical Success Factors

- **Change Management**
 - It is important that none of the existing change and release processes are bypassed or invalidated

“The Backdoor”

Common Pitfall

- **Perceived easier to implement new backdoors than to fix the existing processes and technology**

Ask “Do we have a method to evaluate process effectiveness?”

Critical Success Factors

- **Ease of use and quality content**
 - Any system that is not easy to use or that does not contain high-quality content will fail

“KISS”

Common Pitfalls

- **Those closest to the process decide what is “easy”**

Ask “Have we ever asked the User to evaluate our process for ease of use?”

Common Pitfalls

- **It is left to Development to create the “High-quality content”**

Ask “Who is responsible for creating and maintaining our content?”

Common Pitfalls

- **Multiple repositories of the same or similar information**

Ask “Do the different contact channels access the same repository of information?”

Critical Success Factors

- **Communication**
 - Users need to know what self-service channels are in place, along with the value and responsibilities of using them

“Out of Site, Out of Mind”

Common Pitfalls

- **Project launches in a vacuum**

Ask “Is Marketing involved in every service or product launch?”

Common Pitfalls

- **End Users have no idea how to use the system**

“There’s a Sixth gear?”

Ask “How can we better educate our staff and the users on our service or product?”

Critical Success Factors

- **A willingness to relinquish control**
 - It is essential to put the right processes and tools in place to ensure that while the Customer is in control, they are following a carefully designed path

“These aren’t the droids you are looking for.”

The User's Mental Model

If you understand how they want to interact, you can anticipate their requests

Self-Service Example

- Local Cable Company – High Speed Internet
 - Call in to report connection is down
 - CTI looks up my account
 - Voice prompt plays any outages for my area
 - **Call Deflected**

Self-Service Example

- Local Cable Company – High Speed Internet
 - What would be nice?

“Would you like us to call you when service is restored?”

Why is this important?

- Persona keeps the user interested and engaged
- Easier for the user to understand
- User buy-in

**Take Away - What are you
going to do today?**

elevating service excellence through people, process & technology



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