

Whitepaper

Seven steps to successfully implement more effective self service IT support



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Seven steps to successfully implement more effective self service IT support

Introduction

The goal of many Service Desks¹ is to increase the level of service for users and/or minimize costs in order to achieve a company's overall goals and strategies. One effective way to achieve this is by offering a self service support system of some kind for the users. Self service systems function as filtering systems for simple and recurrent problems that would otherwise place strain on the first line, manned support system.

Self service support related to other types of support in a support organisation



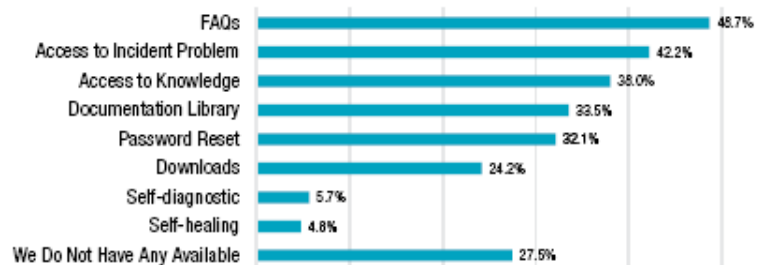
Statistics from the 2008 HDI (Help Desk Institute) report show that almost half (47%) of support organisations in the survey currently use a self service support system – so-called self-help tools. A further 25 % intended to implement a self service system in the near future. The study was based on 1,000 support organisations in five countries (the majority of the organisations were in USA).

There are various kinds of self service system, for example FAQs, access to Incident Problem, access to knowledge, documentation libraries, password reset services, downloads, self-diagnostics and self-healing tools. The most common kind of support system, according to the HDI report, is some form of FAQ (49%). FAQs can be anything from simple, pre-packaged solutions, such as a page on a website with answers to the most common queries, to more advanced tools with search engines, statistics and other functions intended to ease matters for both users and support organisations.



The purpose of this white paper is to offer advice about how you can begin working with self service support systems in an effective way, and how you can ensure long-term success, both by increasing the level of service to your users, which indirectly results in financial benefits for the company, and also by creating direct financial savings through the handling of fewer cases by manned support systems.

Percentages of self service systems used by support organisations (HDI report 2008)



¹ The term Service Desk is also used in various contexts for help desk or customer service, and represents any form of support organisation. The term Service Desk is used in this report.

Seven steps to successfully implement more effective self service support

In this paper we present seven success factors for creating more effective self service IT support. The first decisive step is to choose appropriate goals and strategies that support the overall support goal of the Service Desk. The second step is to firmly establish goals, benefits and new working methods in the organisation. Step three deals with integrating the self service system with other support routines in order to ensure that it becomes an integral part of the entire process. Step four entails appointing a Content Manager. Step five entails making the service accessible for the user by minimizing complications for using the service. Step six stresses the importance of advertising the new support routines to ensure that their first step will always be to try to solve problems via the self service system. The final step entails establishing goal-based ratios to follow up and calculate the financial returns.

Seven steps to successfully implement self service support.



Step 1: Choosing goals and strategies

When implementing a self service support system in an organisation it is important to decide and clarify an overall goal as early as possible that underpins the overall support goal for the support organisation. In this way one can perform an evaluation at a later date to ascertain whether or not the implementation has been successful, and if it has truly benefited the company.

It is especially important for web services to have clear goals and strategies as they can otherwise be easily relegated to the background by more tangible and visible functions, such as manned support systems. It is easier to quickly assess the value of visible and tangible services and products. In other words, a web service that is functioning

well can generate considerable financial savings for a company without actually being noticed, unless reviewed, measured, and subsequently communicated to the organisation. A manned support system, on the other hand, is highly visible for everyone.

Setting the right goals

Setting the right goals for a self service support system can be a challenge. In general, one usually chooses between two types of overall goal for the



service itself – reduce costs or increase the level of service. One can strive towards both goals, i.e.

to successfully reduce the actual support costs and at the same time

increase the level of service through increased accessibility. It is recommended, however, to keep focussed and choose a single overall goal for the implementation of a self service support system. One problem that can arise, for example, is that it becomes more difficult to measure the actual level of success, i.e. measuring the cost in relation to the level of service, as well as deciding which activities should be prioritised.

Communicating goals and strategies

One of the most important reasons to produce clear goals and strategies is to establish a common direction for everyone involved at different levels and in different roles in the implementation and administration of the self service support system. To have everyone understand the overall goal, and to cooperate to achieve it, is an important factor for long-term success and will increase the likelihood of decisions being taken correctly

throughout the entire process. For every important issue that arises, or decision that must be taken, one can consider which solution would most successfully promote the overall goal. Another advantage of everyone being sure of the goal is that decisions can continually be delegated, which leads to increased efficiency and speed in the implementation.

A well-established goal increases the motivation of those involved in the project and contributes to the raising of standards in order to reach the established goal, i.e. the goal has a performance-boosting effect. As such, it is important to find a balance between ambitious yet achievable goals. When stepping into a completely new arena and playing field it can be tactically advisable not to set goals too high at the start, otherwise a failure to reach a goal could hinder the project and create an atmosphere of doubt over the entire concept. For this reason, it is important to establish a moderate goal and create an atmosphere of success by achieving this goal. After this, higher goals can be set in the future when the concept is already proven.

EXAMPLES OF OVERALL GOALS:

1. Reduce support costs by x SEK per year.
2. Increase the level of service with an increase of x solved cases without increasing support costs.
3. Increase the level of service with an increase of x solved cases for an increased support cost of x SEK.

EXAMPLES OF INTERMEDIATE GOALS:

1. Reduce the cost per solved case.
2. Increased accessibility 24/7.
3. Increase the SCI (Satisfied Customer Index).
4. Solve more support cases.
5. Higher solution rate for support cases in total.
6. Move x per cent of all support cases to self service.
7. Move x per cent of all knowledge-based support cases to self service.

Step 2: Establish within the organisation

After the goal and strategy have been chosen for the self service system, it can be useful to clarify the goal and benefits of the system for both the management and those working in the manned support system. It is not sufficient simply to purchase a self service system and implement it; it should also be firmly established within the whole organisation. It will otherwise be at risk of simply existing without actually being used and will not, therefore, offer any benefit to the business.

Secure ambassadors in the organisation

In order to establish the new support method in the organisation more easily, it can be useful to secure important key figures that are active and enthusiastic about change and development and that can act as ambassadors. This can entail finding interested and well-informed people – co-called superusers – who can disseminate enthusiasm about the new method and service. It is of primary importance to find true enthusiasts among the management.

Provide timely feedback about financial returns

In order to feel more secure about the investment in a self service system, and to firmly establish this with the management, it can be appropriate to provide timely feedback about financial returns. This can be achieved, for example, by implementing a limited pilot project prior to the company-wide launch, or by executing a financial review and producing a report shortly after the launch of the system to show its potential and thereby increase confidence in the system (read more about ROI in step seven).

Outline the advantages of the new system for the manned support

It can also be advantageous to establish the new working methods with the manned support, thereby avoiding potentially hostile attitudes where the new service could theoretically deprive employees of their jobs. It is important in this case to outline the benefits, using the established goal plans, and encourage participation in workshops and courses, for example.

Step 3: Integrate the self service system with other support routines

Perhaps the most important factor affecting long-term success is the integration of the self service support system with existing support processes and routines. If the self service system can be successfully pieced into the overall support service puzzle so that both support agents and users can see the value and benefit of the self service system, then this is conducive to achieving tangible financial returns from the service. Both integrations – technical and process-related – can be considered equally important, as the absence of one would most likely result in an unsuccessful implementation of the service. For example, the Service Desk and other channels can spend much time and effort unsuccessfully reminding the user to use the self service system if the system is not technically integrated and easily accessible by the user. By contrast, the service could boast excellent accessibility and high visibility on the intranet and other locations, but if the user has not been informed about the service or its benefits, usage will be limited.

Process-oriented integration

To integrate the self service system with the other support channels, existing processes and routines should be reviewed to ascertain how the self service system could contribute to a more effective support system; in this way, the self service system can become an integral part of all Service Desk processes and routines.

Draw up guidelines for the Service Desk to assist users in making use of the self service system for simpler problems, which will then free up the Service Desk to take care of more complex matters. This can entail support personnel redirecting users to the service each time they seek assistance, which can be achieved by solving the problem together with the user using the self service system, e-mailing the solution from the self service system, or by placing higher demands on users, asking them to begin by searching in the system on their own, for example.

EXAMPLES OF PROCESS-ORIENTED INTEGRATION:

- In each instance of telephone and e-mail contact with the manned support, remind the user that they can get support from the self service system.
- Maintain a continuous dialogue with business personnel to identify needs and then proactively develop the appropriate content in the self service system.
- E-mail/push out support guides directly from the self service system to users when they contact the Service Desk.
- Ask users to begin by searching the self service system on their own regarding simpler and recurring problems.

Technically-oriented integration

In certain cases, a simple text link on the intranet can work perfectly in connection with the giving of appropriate information. It is recommended, however, to find a number of appropriate locations to make the service accessible via links and the web service.

EXAMPLES OF TECHNICAL INTEGRATION:

- Send a service request to the case management system from the self service system.
- Request the creation of a specific support guide directly from the case management system.
- Create search functions in the case management system that allow support agents to easily search in the self service system database without the needing to change systems.
- Log all solved cases in the self service system so that they are automatically logged as solved cases in the case management system.
- Integrate specific modules from the self service system at higher levels on the intranet via the web service.

Step 4: Appoint a Content Manager for administration

To ensure long-term results for the investment in the self service system, one or more persons should be appointed to update and maintain the service to fulfil the needs of the business – so-called Content Managers.

Publish the most common questions

In order to proactively fulfil the needs of the business, the Content Manager should begin by publishing solutions to common and recurring queries in the support system. This will usually result in a considerable reduction in the number of incoming telephone queries. Certain self service systems are supplied with ready-prepared support material as well as the ability to create customized support guides for the specific needs of the business.

Update regularly according to requirements

The Content Manager has the important task of updating the system with support guides when important new software is introduced or when existing systems are upgraded. Another task for the Content Manager is to study statistics to ascertain which areas in the business lack user support (read more about measurements in step seven).

Establish scheduled days and publishing policies

One way to successfully achieve continuity in the administration of the service is to work with scheduled days and publishing policies with style guides, which offer writing directions.

Step 5: Ensure the self service system is easily accessible for users

Availability and accessibility are important aspects to take into consideration when planning the implementation of a self service system. One strategy employed successfully by many is to make the service as visible, and with as many access points, as possible, i.e. it is not only important to find the optimal position, but also to continually review which existing locations can be used to make it easier for the user to find the service. It is usually effective to have a clear and accessible position that users can learn to use over time to access the service.

Solutions close to problems

An effective way to help users find the self service system is by making the service accessible wherever the need for support arises, i.e. directly from the various applications that the self service system supports. If the self service system handles the most common queries about a certain business system, then one should investigate the technical possibilities for creating a direct link from the business system to the self service system. In such cases it is usually appropriate to contact the system owners, as they will understand the advantages of implementing an easily accessible self service support system for their own systems. The role of system owner often includes an overall responsibility for training and support; this is often neglected.

Establish many access points for the system

It is generally a good idea to establish many access points for the system. If it is technically possible to ascertain how most users access the self service system, this can be a good way to learn what works well for your specific users.

Examples of places where the self service system should be technically integrated to allow better access for the user:

- On the intranet – the higher up in the page hierarchy the better.
- Directly in the various applications the service supports.
- On the computer desktop or on specially designed toolbars with quick buttons.

Step 6: Advertise the self service system for users

A self service system cannot breathe in a vacuum. It can take some time to become established with users following a radical change of support management. Some users will adopt the self service system from the first day, while others will require encouragement to get started. There are also probably some users who will never use the self service system. When new IT services are introduced, or when existing systems are upgraded, the need for support is emphasised for the user; as a result, this is a good moment to show the benefits of the self service system to the user.

Make internal advertising of the self service system an integral part of the information strategy

In order to help users make the most of the self service system before contacting the Service Desk, the service must be continually advertised. For this reason, internal advertising of the self service system must be made an integral part of the information strategy of the IT and Support departments. Users can be repeatedly informed of the service via newsletters, newspapers, the intranet and information meetings, for example. Support workers can add a direct link to the self service system at the foot of e-mail messages. Administrators and enthusiastic users – so-called superusers – can be encouraged to disseminate information about the service. They can also be trained to use the system's functions and encouraged to become ambassadors for users.

Make use of well-established info channels

To advertise the self service system, well-established channels should be used. One example of a seemingly good idea that turned out to be unsuccessful was the advertisement of the self service system on the first page of the intranet – although presented clearly, this did not result in users adopting the system to any considerable degree. If general problems hamper the intranet, this will, of course, result in negative consequences for any service advertised there. In the example given above, it would be even more important to find alternative advertising channels and locations.

Use correct terminology

It can be a challenge to describe the self service system. Perhaps the greatest challenge is that users have different opinions about what the self service system is, and they perhaps even use different terminology to describe the same thing. For example, if someone reads on the intranet, "Here you will find our self service IT support system available 24/7", then it is likely that users will imagine different things. Various ideas must be tested in order to reach the optimal solution. The more clear, simple and descriptive a text is, the more generally effective it will be. For the simple reason that this is still a new term for many, it is advisable not to complicate matters.

Continuous information over many channels

It is important to constantly remind users of the potential for solving their own problems using the self service system, as it can take some time for users to get used to this new support option. For example, users can be accustomed to calling directly to the Service Desk. Read more about process-related integration in "Step 3: Integrate the self service system with other support routines".

It can also be useful to use various channels to make the advertising more effective. No two people are the same, and we all have different capacities for absorbing information. By using various information channels, the likelihood increases of reaching as many target groups as possible with the information.

EXAMPLES OF INFORMATION CHANNELS:

- News relating to the description of new IT services on the intranet, using newsletters or the internal newspaper.
- Through superusers and the enthusiasm of other interested parties.
- In the foot of outgoing e-mail messages from Service Desk personnel.
- Direct reminders from the case management system before users register queries.
- Automatic replies sent to users from the case management system.
- In the telephone answering service for the Service Desk, either as an introduction or during queuing.
- Verbally – during courses, information meetings and personnel meetings, etc.

Step 7: Measure the impact and follow up

In times of recession companies tighten their belts and focus on cost control. In a study carried out by Accenture among 70 Scandinavian companies in 2006, 90 per cent of those asked maintained that they had complete control over their IT costs, while at the same time less than 10 per cent had methods or models in place to calculate the benefits of their IT investments. +This is probably due to the fact that IT services and support departments are usually seen as only incurring costs rather than producing savings. By making the effects and benefits of investments visible, one can promote understanding, produce data on which to base decisions, and stimulate confidence in the organisation.

In order to display the impact and benefits of the self service system, it is important, before the launch, and based on the overall goals, to establish which ratios are to be measured and followed up, and also to make a so-called zero measurement to establish the starting point for measurements and thus make comparisons over time. This zero measurement pertains to the total status of the Service Desk, including total number of cases, solution level, support costs, etc., in order to ascertain how successful the implementation of the self service system has been in improving the service to users and reducing support costs.

Measure changes in the level of service to users

Regarding an increased level of service to users, it is important to measure the frequency of solved cases before and after the implementation of the self service system, and also the usage of the system after it has been launched in the organisation. One consequence of the implementation of a self service system is that the number of solved support cases will increase in general, partly due to the self service system relieving the pressure on the support team, and partly due to more users seeking assistance thanks to increased support options satisfying their various needs for problem-solving. Some users require personal assistance, while others avoid waiting in telephone queues and being limited

to specific opening hours by solving problems themselves with step-by-step instructions. An increased number of support options usually results in a high IT maturity level for the company. Another consequence is that the overall solution level of the support department increases after the implementation of a self service system, while the solution level of the first line actually decreases. This is due to the fact that the simplest problems are filtered off by the self service system before they reach the first line, which results in the first line dealing with a higher proportion of more complex problems than before.

RATIOS FOR MEASURING INCREASED SERVICE LEVELS

* Number of solved cases * Level of solution

Measure attitude changes

It can be advantageous to measure attitude changes in the organisation by way of attitude reviews and KPIs (Key Performance Indicators). A self service system often functions as the external advertising channel for an IT Service Desk; together with the new working methods and with a long-term perspective, this can contribute towards a higher status due to improved communication and collaboration with the organisation.

Measure financial benefits of the investment

By implementing a self service system one can reduce support costs. In this case, it is important to measure the benefits of this service in the form of time and cost savings, as well as the financial returns in relation to the investment. For a quick overview of how cost-effective Service Desk support is, one can easily calculate how large a proportion of all support cases are solved via the self service system – the self service level. It is desirable to maintain as high a self service level as possible, in order to reduce the proportion of cases that are dealt with by the manned support, which is more costly.

RATIOS TO MEASURE REDUCED SUPPORT COSTS
Benefit

* Self service level

= Cases solved via self service / Total cases lodged with the Service Desk

* Time savings for manned support team

= Time to solve cases with the manned support team - time for maintenance of self service system

* Cost savings

= Number of solved cases x cost per hour for manned support / average time saving per case

Cost

* Cost for self service system + maintenance costs

ROI

* $(\text{Benefit}-\text{Cost})/\text{Cost} \times 100$

The time saving that results from the self service system makes it possible for the manned support to deal with more complex cases; they can also work proactively to deal with simple and recurring queries in the organisation.

To calculate the benefit of the self service system, it is also advantageous to examine how large the cost savings are that result from the manned support being freed up from cases that now go through the self service system. It is often shown that one would have to employ more workers to maintain an equivalent level of service, as the overall number of solved cases increases following the implementation of a self service system. A general increase in the overall number of queries from users to the Service Desk is also usually seen over time.

The cost of implementing a self service system is usually relatively low, entailing costs for the service itself, integration with other support services, and regular maintenance and updating of the system with business-specific guides to meet users' needs. Having calculated the benefits and costs, one can calculate the financial return of an investment in a self service system (Return of Investment, ROI). A ROI calculation made by Nynas AB, a leading specialised oil company with over 900 employees, showed a return of 376 % during the first year (2008) following the launch of the self service support system ComAround Self Service™. This means that one can recoup an investment cost 3.7 times over in the first year alone.

Nynas AB's ROI calculation of ComAround Self Service™ year 1 (based on 2008)

Benefit: 1 699 800 SEK

Cost: 357 200 SEK

ROI =376%

Benefit from new knowledge

Important new knowledge gained from statistics about the self service system is also beneficial in getting to know the needs of the business. By making use of user scores and polls regarding support guides, one can gain a clear picture of what should be improved or added to the content. In certain self service systems it is also possible to see which words and phrases users have entered in the search engine that did not result in hits, i.e. where users did not find support guides to solve their problems. This can offer an indication of users' needs and of possible gaps in the content, which can help prioritise future guide production.

Measure to ascertain specific needs of the business

* Which search words and phrases, and number of instances

Summary

Many Service Desks use self service systems to offer a more effective support system to their users, and many support organisations are planning to acquire such systems in the near future. Self service systems function as filtering systems for simple and recurrent problems that would otherwise place strain on manned support systems.

The purpose of this white paper is to offer advice about how you can begin working with self service support systems in an effective way, and how you can ensure long-term success. The report presents seven steps for success. The first step is to choose an overall goal and strategy. The report discusses the importance of prioritising and choosing a goal that adequately underpins the overall support goal. The overall goals for the self service system are often defined as increasing the level of service to users and reducing costs.

The next step involves clarifying the goals and benefits of the self service system so that they become established in the organisation. It is important to find ambassadors in the organisation, among both the management and users, that have a passionate interest in the area, as well as providing timely feedback regarding the financial returns of the investment in the implementation of a self service system. It is also recommended to outline the benefits of the self service system for the manned support personnel by using the established goal plans and encouraging participation in order to avoid potentially hostile attitudes where the new service could theoretically deprive employees of their jobs.

Step three deals with integrating the self service system with other support routines; this applies to both process-oriented and technically-oriented integration. If the self service system can be successfully implemented as an integral part of the overall support process, this is conducive to achieving tangible and long-term financial returns from the service.

Step four entails appointing Content Managers, i.e. one or more persons appointed to update and maintain the service to fulfil the needs of the business. To begin with, the solutions to common and recurring questions should be published; this often results in a considerable reduction in the number of incoming telephone queries. The system should also be updated regularly, for example when existing systems are upgraded or when important new ones are introduced, to ensure the long-term impact of the investment.

The next step discusses the importance of making the self service system easily accessible for the user, minimizing obstacles for usage. It is important to have several access points for the service and to make the service available exactly where problems and needs arise, i.e. directly from the applications that the self service systems supports.

Step six deals with the challenge of users adopting the system when a radical change of support management occurs, even if the system is easily accessible for the user. The report stresses the importance of advertising the self service system for users, and allowing it to become an integral part of the overall information strategy. This information must be repeated many times through several channels, such as news relating to the description of new IT services on the intranet, using newsletters or the internal newspaper. Other channels include links in the foot of e-mail messages, or in the telephone answering service for the Service Desk, either as an introduction or during queuing. The greatest challenge can be to establish an appropriate description of the service, as the term "self service system" is still relatively new. The final step entails measuring and following up the efforts taken based on the established goals in order to learn from important new knowledge. The report offers examples of various ratios that can be used to measure the increase in level of service, attitude changes in the organisation regarding IT and the Service Desk, important new knowledge of users' needs, and the financial benefits resulting from the implementation of a self service support system.

About ComAround

ComAround are market leaders in the field of services for web-based self service. We have been developing smart services for more than ten years now, helping everyone working on computers to resolve their problems quickly and easily online.

Companies in more than 100 countries are reducing their support costs and improving their service by using ComAround Self Service™ 24 hours a day, 365 days a year. Our clients include companies such as the Swedish International Development Cooperation Agency, Ericsson, Sandvik, Statoil, SEB, Skandia, IKEA and hundreds of smaller companies.

ComAround Self Service™ supports the IT department's work on daily in-house support. ComAround Self Service™ has proven to be invaluable in respect of migrations and switches to new software versions.

Thank's for reading our white papers!

Find out all about web-based self service in our white papers. ComArounds white papers are available for for free at:

[http://www.comaround.com/the-concept/white-papers.](http://www.comaround.com/the-concept/white-papers)

Authors:

Per Strand, ComAround
Executive Vice President
pers@comaround.se



Therese Walve, ComAround
Online Marketing Manager
therese.w@comaround.se

